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Insurance Processing

PROCEDURE MANUAL
CLER for Carriers



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Introduction

This procedure provides instructions for accessing and operating the Office of Personnel Management (OPM), Federal Employees Health Benefits (FEHB), Centralized Enrollment Clearinghouse System (CLER). The following information will help you use the procedure more effectively and locate further assistance if needed.



Overview

CLER receives electronic FEHB enrollment data from health insurance carriers and Federal payroll offices on a quarterly basis. The CLER database stores, maintains, processes, edits, and combines the data from the carriers and compares it to the data from the payroll offices. The National Finance Center (NFC) takes a proactive approach to resolve any discrepancies between the carrier data and the payroll office data identified during the operation of CLER by working with Federal Agencies (payroll offices and personnel offices), carriers, and individual enrollees, as needed.

Authorized users of CLER can access data when security access is requested by the security officer and clearance is provided by the NFC's Operations and Security Center (OSC).

This section includes the following topics:

System Capabilities and Interface.....	3
Reports Through CLER.....	4
Forms.....	4
Responsibilities	5
CLER Online Help	6
Who to Contact For Help.....	8

System Capabilities and Interface

Payroll offices electronically submit quarterly FEHB enrollment data directly to NFC. Carriers submit their FEHB enrollment data quarterly to the OPM data hub which in turn submits the data to NFC. Upon receipt, the enrollment data is processed into NFC's mainframe. The mainframe database stores, maintains, processes, edits, matches, combines, and compares the enrollment data from the payroll offices to the data from the carriers using edit tables.

After the data is entered into the mainframe, the data is sent to the CLER Web server where the Agencies, carriers, OPM, and NFC access the data for inquiries, contact information updates, discrepancy corrections, and report generation.

Using the Web server, an Agency may query on its data. To assist the Agency with the reconciliation process, reports are developed using the report generation capabilities that are modeled on NFC's Reporting Center. Using the data that resides in CLER, users can tailor their reports to meet their specifications. Based on the Agency analysis, a discrepancy with the carrier data may be encountered. The Agency may submit forms requesting corrective action from the carrier electronically using the CLER Web server. The corrective action request file is forwarded from the Web server through the NFC mainframe, where it is processed and transmitted to the carrier through OPM's data hub.



Carriers respond to the corrective action request directly through the Web server. The carrier response and update is maintained on the database and is available for inquiry by the Agencies. To further assist the carrier in the response, the carrier may develop customized reports in CLER.

Agencies and carriers have primary contacts in each of their organizations and must maintain the contact information in CLER.

OPM oversees the operation of CLER. To perform this role, OPM has inquiry and report capabilities for all carriers and Agency participants. The system provides statistical information relative to the number of discrepancies, occurrence rates, corrective actions, enrollment changes, etc. This information provides OPM with data needed to effectively manage and oversee the FEHB reconciliation process.

NFC maintains the system, updates all tables and edits as necessary, and maintains system security.

Reports Through CLER

CLER supports and facilitates report creation. CLER report creation is modeled on NFC's Reporting Center, which is an integral part of several other NFC applications.

Selection criteria, sorts, and formats are built into the CLER reporting database. With the flexibility of the reporting options offered, users are able to design custom reports from the options displayed on the Reports Selection page.

Forms

Forms associated with CLER activities are described below.

Standard Form (SF) 2809, Health Benefits Election Form

This form is used by (1) Federal employees eligible to enroll in or currently enrolled in the FEHB program, (2) former spouses of Federal employees eligible to enroll in or currently enrolled in the FEHB program under the Spouse Equity law, and (3) individuals eligible for temporary continuation of coverage under the FEHB program to:

- Enroll eligible persons in the FEHB program.
- Elect not to enroll in the FEHB program.
- Change an enrollee's plan.
- Change coverage within a plan.



- Cancel the FEHB enrollment of an enrollee who elected to end his/her coverage though he/she continues to be eligible for it, and no extension of coverage is granted.

SF 2810, Notice of Change in Health Benefits Enrollment

This form is used to:

- Terminate the enrollment of (1) an enrollee employed by the Federal Government who leaves Government service, or (2) an enrollee employed by the Federal Government who exceeds 365 days in non-pay status and is eligible for a 31-day extension of coverage.
- Reinstate enrollment.
- Change the name of an enrollee.
- Change the enrollment to a survivor annuitant.

Note: The 2809 and 2810 options in CLER are formatted to include data elements from the forms listed above, as well as the data elements from the 2809 and 2810 options in Employee Express.

CLERC, Security Access Form, Health Benefit Carrier Personnel

This form is completed by a carrier's security officer and submitted to NFC's OSC to request CLER access for carrier personnel.

Responsibilities

Following are the general responsibilities of the primary organizations involved in the operation of CLER.

Agency:

- Appoints a primary and an alternate security officer who coordinates all requests with NFC for CLER access authorization.
- Transmits FEHB enrollment data to NFC.
- Establishes and maintains payroll and personnel office contact information in CLER.
- Reviews and researches current and/or prior quarter enrollee transmission records.
- Reviews and researches current and/or prior quarter enrollee discrepancy records.
- Enters reconciliation action codes to record corrective actions.
- Enters reconciliation reason codes for discrepancies.
- Views responses from the carrier on corrective action taken.
- Inputs, faxes, or mails 2809 and 2810 data for carrier corrective action/corrections.



- Verifies that corrective actions/corrections have resolved discrepancies.

Carrier:

- Appoints a primary and an alternate security officer, who coordinate all requests with NFC for CLER access authorization.
- Transmits FEHB enrollment data to the OPM data hub.
- Establishes and maintains carrier and carrier plan contact information in CLER.
- Reviews and researches current and/or prior quarter enrollee transmission records.
- Reviews and researches current and/or prior quarter enrollee discrepancy records.
- Enters response codes to respond to the corrective action requests from Agencies.

Note: The carrier takes no action unless authorized by the responsible Agency.

OPM:

- Oversees and manages the reconciliation process.
- Views all carrier and Agency enrollment records.
- Views all contact information.
- Views all table information.
- Takes action to ensure user compliance.

NFC:

- Operates the CLER system.
- Provides operational support to resolve reconciliation problems.
- Researches and resolves system inquiries.
- Provides subject matter expertise.
- Provides training to CLER users.
- Coordinates system/user compliance issues with OPM.
- Maintains security over all data residing in CLER.

CLER Online Help

CLER Online Help provides three methods for locating information:



- **Table of Contents.** To access the Online Help Table of Contents, click the question mark (?) icon on the CLER Main Menu. To view the text associated with a topic, just click the topic.

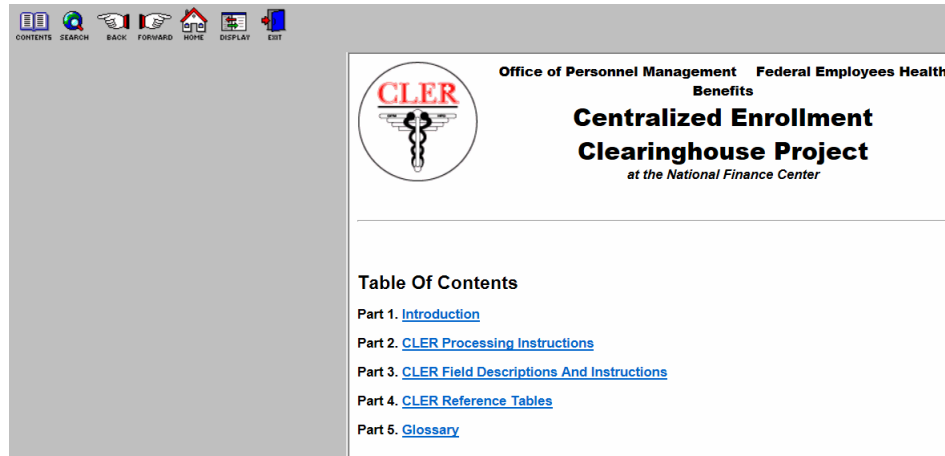


Figure 1: Online Help Table of Contents

- **Word Search.** To conduct a word search, click the Search icon in the Help menu bar. Enter a word or words in the space provided to display associated topics. Click any topic to view the associated text.
- **Help Button on System Pages.** For field instructions/descriptions on a specific page, click the question mark icon [?] on that page.

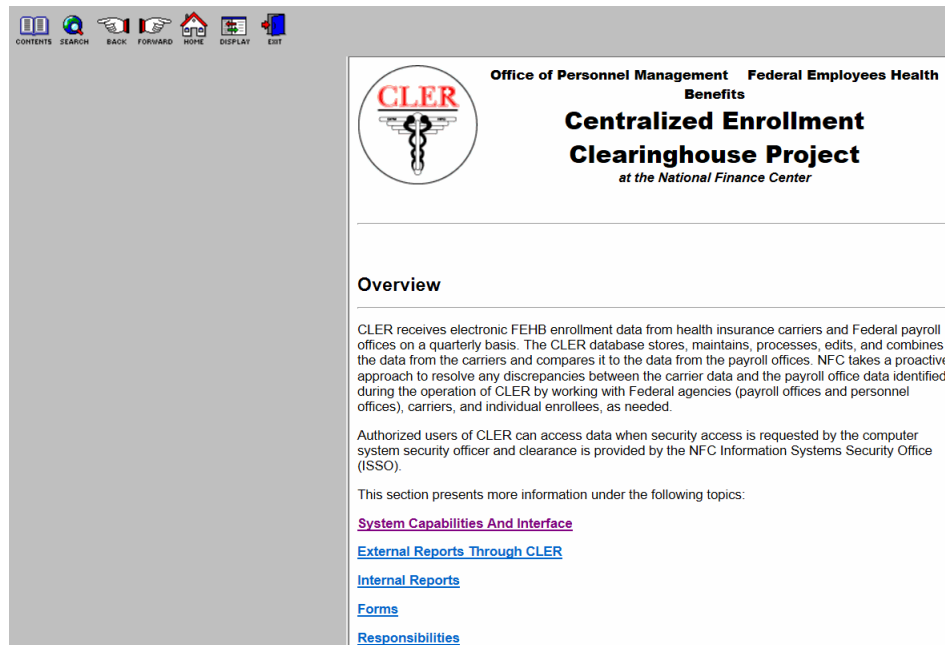


Figure 2: Expanded Online Help Table of Contents Page



Who to Contact For Help

For questions about requesting access to CLER, contact the CLER Operations and Reconciliation Unit at **1-855-632-4468**.

For questions about CLER processing (including help with unusual conditions), contact the CLER Operations and Reconciliation Unit at **1-855-632-4468**.

For questions about access authority, contact your organization's security officer. When necessary, your security officer may contact NFC's OSC at **1-800-767-9641** or **504-426-6435** or via email osc.etix@usda.gov.



System Access

At the request of OPM or OPM's delegated authority, NFC grants users the authority to access the CLER Web-based application. Users request access through their security officer. Each user (Agencies and carriers) is required to establish a primary and an alternate security officer, who coordinate all requests with NFC for CLER access authorization. Users, with approval from their organizations, are allowed to have access to appropriate resources, and OPM may grant access permission to other users or groups of users. Resource access permission is limited to the extent determined by OPM, NFC, and the approved user organizations (e.g., participating Agencies, carriers, or auditors.).

This section includes the following topics:

Requesting Access to CLER	9
Security Officer Responsibilities.....	9
Log On	10
Log Off.....	13

Requesting Access to CLER

NFC will grant authority to use/access its facilities to individual users at the request of OPM and the user's security officer. Every user is assigned a unique ID number which defines the specific information a user has access to based on job responsibilities, need to know, and the user's security policy. Communications related to gaining access to CLER must go through the user's security officer to NFC. To gain access to CLER, the user's security officer must complete the Form CLERC, CLER Security Access Form, Health Benefit Carrier Personnel, and send it to NFC's OSC via fax at **1-888-496-8192** or **1-303-205-3276** or email at osc.etix@usda.gov.

For an electronic and/or paper copy of Form CLERC, CLER Security Access Form, Health Benefit Carrier Personnel, ask your organization's security officer to contact the CLER Operations and Reconciliation Unit at **1-855-632-4468**. For questions about access authority, contact your security officer. When necessary, your security officer may contact NFC's OSC at **1-800-767-9641** or **504-426-6435** or via email osc.etix@usda.gov.

Security Officer Responsibilities

The User's Security Officer will:

- Obtain organization and/or owner authorization approval(s) and request user identifications (IDs) according to the user's security policy.
- Submit the request for access to CLER to NFC's OSC.



- Suspend user IDs upon the employee's termination or assignment change.
- Notify NFC of any changes in the authority or of the termination of an employee in their organization.
- Consult with NFC's OSC on security matters related to the use of NFC's facilities.
- Monitor users' activity for access violations.

NFC's Security Officer will:

- Grant authority to use/access the computer facilities based on OPM's authority and the user's requirements.
- Establish, control, and maintain user ID.
- Log all unauthorized access attempts and furnish reports to the respective user security officer for appropriate action.
- Monitor security concerns of OPM and the user security officer related to NFC's facilities and resources.

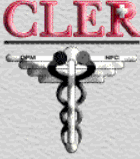
Log On

To log on:

1. Access the Internet and log on to the CLER Web site at <https://www.nfc.usda.gov/ClientServices/Insurance>. Click the CLER icon on the Application Launchpad. The CLER Logon page is displayed.

Note: To display information about the CLER application's accessibility and security, click Accessibility or Security, as applicable.





Office of Personnel Management Federal Employees Health Benefits Centralized Enrollment Clearinghouse

User ID

Password

☐ Change Password


Important Message: May 29, 2014

CLER has completed processing of the third quarter data.

If you have any questions or concerns, please contact the CLER Operations and Reconciliation Unit at nfc.cler@usda.gov or you may call 504-426-6410 between the hours of 7:45 a.m. through 4:00 p.m. CST Monday through Friday.

Version 2.0 of the CLER for Agencies, CLER for Carriers, and CLER for OPM procedure manuals HAVE BEEN REPLACED with Version 3.0 of these procedures. They are available on the NFC Web sites Publications page. On the Publications pages right-hand menu, select Procedures by Title/Chapter and locate the manual that applies to your organization under Title 10.

Please send questions or comments to nfc.cler@nfc.usda.gov



[Accessibility](#)

[Security](#)

[Escalation Process](#)

[CLER Phase 2 - Payroll Office File Layout](#)

The National Finance Center (NFC), designed, developed, implemented, and operates this Federal Employees Health Benefits (FEHB) Centralized Enrollment Clearinghouse System, called CLER, for the Office of Personnel Management (OPM).

This system receives electronic FEHB enrollment data from health insurance carriers and Federal Government payroll offices on a quarterly basis for approximately four million health benefits enrollees.

The system provides an efficient and cost effective way for both health insurance carriers and Federal Government payroll offices to conduct their quarterly reconciliation of FEHB enrollment data records as required by OPM. The CLER database stores, maintains, processes, edits, combines, and compares the FEHB enrollment data received from the Payroll Offices and participating Carriers. NFC takes a proactive approach to resolve any discrepancies between the payroll data and the carrier enrollment data identified during the operation of CLER by working with payroll and personnel offices, health insurance carriers, and individual enrollees, as needed.

CLER was designed and developed with the potential for future improvements and expansion beyond basic reconciliation in the event OPM should desire such enhancements.

Figure 3: CLER Logon Page

- Complete the fields as indicated below and click **Submit**. The CLER Main Menu is displayed.

Field	Instruction/Description
User ID	<i>Required, alphanumeric, 8 positions maximum</i> Enter the assigned National Finance Center user ID.
Password	<i>Required</i> Enter the password. If unsuccessful, a message will appear stating that the user ID or password entered is invalid.
Change Password	To change the password, click the checkbox. The Change Your Password pop-up window is displayed, prompting the user to enter and confirm the new password. Type the new password in the Enter New Password and Confirm New Password fields and click Submit .

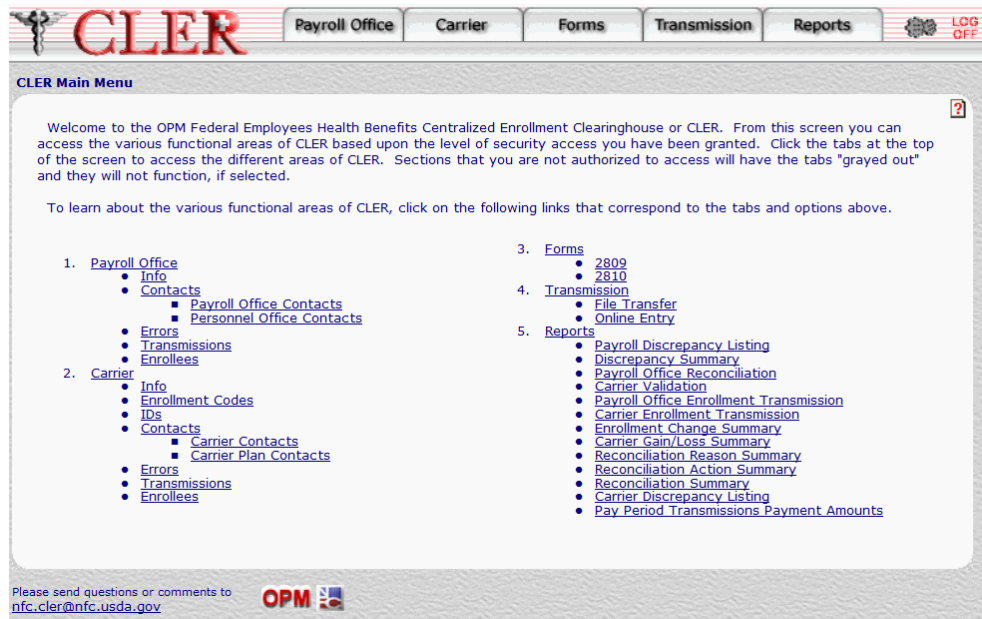


Figure 4: CLER Main Menu Page

Below is a brief description of each option displayed on the CLER Main Menu.

- **Payroll Office.** Used to view payroll office FEHB enrollment information.
- **Carrier.** Used to view and maintain carrier FEHB enrollment information.
- **Forms.** Used to view 2809 and 2810 information.
- **Transmission.** Used to enter transmission information.
- **Reports.** Used to produce reports.
- **“Gears” (icon).** For NFC use only. Used to view CLER processing schedules and system codes information.



Log Off

Click **Log Off** on any CLER page. The CLER Logoff page is displayed and the current session on the CLER Web site is terminated. For the highest security when logging off, close the browser to keep another user from accessing pages in the browser memory.

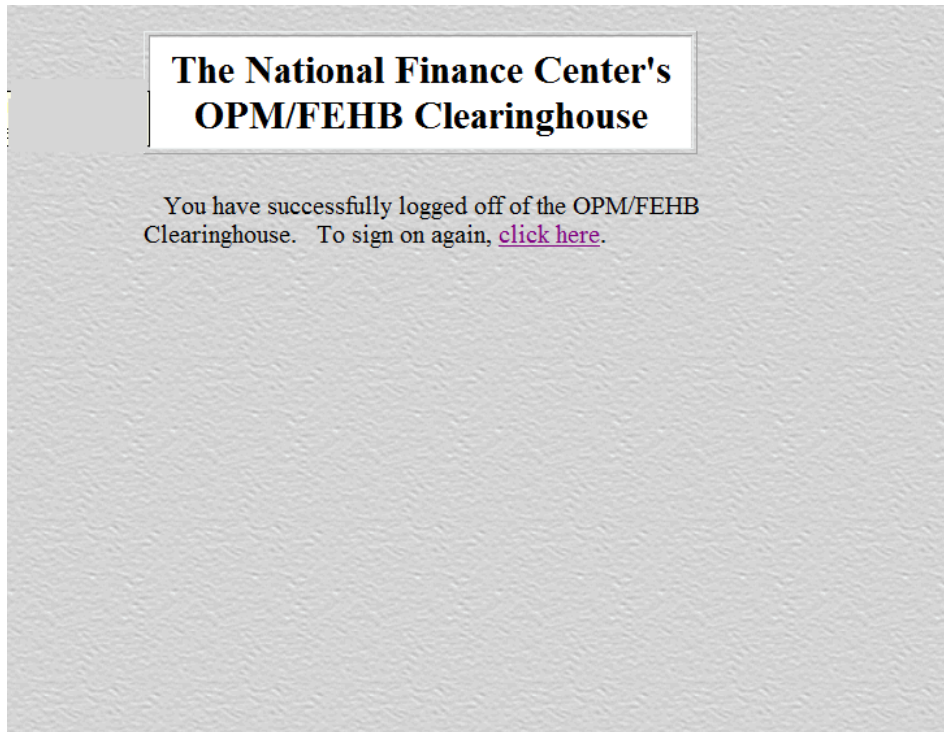


Figure 5: CLER Logoff Page



Transmission of Enrollment Data

Carriers transmit FEHB enrollment data files to OPM's data hub, who in turn, transmits the data to CLER via existing connectivity to NFC.

This section includes the following topics:

Timeline for CLER Quarterly Reconciliation	15
Formatting Enrollment Data Files for Transmission to CLER	18

Timeline for CLER Quarterly Reconciliation

The CLER reconciliation process includes four reconciliation quarters per year. The first quarter begins on March 1; the second quarter begins on June 1; the third quarter begins on September 1; and the fourth quarter begins on December 1. Weeks before a quarter begins, the CLER Operations and Reconciliation Unit sends a copy of the quarterly reconciliation timeline for that quarter to Agencies and carriers via email. Please refer questions about the quarterly reconciliation timeline to the CLER Operations and Reconciliation Unit at **1-855-632-4468**. A sample of the quarterly reconciliation timeline for the second quarter is described in the table listed below.

Note: In the sample timeline listed below, payroll office enrollment data is transmitted directly to CLER and consists of data as of the pay period paid by payroll offices between March 1 and May 31.

Quarterly Reconciliation Timeline

Date (Month/Day)	Description
------------------	-------------



Date (Month/Day)	Description
3/1	<p>Carriers and payroll offices may begin transmitting enrollment data to CLER via electronic input files. Reminders are emailed to carriers and payroll offices regarding the current quarterly due date for the submission of enrollment data to be reconciled.</p> <hr/> <p>Note: The header record submitted by the carriers and payroll offices must include an as-of-date that corresponds with your pay period ending date.</p> <hr/> <p>The enrollment data that is extracted from the carrier and payroll office's records must be those enrollments that are actually in effect that day. Effective March 1, all payroll offices must send a transmission every pay period. Data will be extracted according to the timeline defined by OPM as follows:</p> <ul style="list-style-type: none">• Payroll offices with monthly pay cycles or monthly premium collection cycles, must use the as-of-date equal to the first of the month following the end of month pay cycle. Any data, subsequent to March 1, may cause unmatched errors when compared to enrollee records submitted by carriers. Please do not report changes effective after March 1.• Payroll offices with pay cycles other than monthly, must extract data effective as of the last pay period that falls between March 1 and March 15. The end of the pay period date must be reflected in the header as the as-of-date. <hr/> <p>Note: Transmissions received with the as-of-dates between March 1 through March 15 will be used as the 1st quarter reconciliation file. A transmission must be sent for every pay period.</p> <hr/> <ul style="list-style-type: none">• Carriers must extract data effective as of March 1. There are no changes to the frequency of transmissions from the Carriers. <p>Carriers and payroll offices must include the correct submission date in the header record they transmit to CLER. The following are valid submission dates:</p> <ul style="list-style-type: none">• For a payroll office, the submission date is the date they send their file to NFC.• For a carrier, the submission date is the date they send their file to the OPM Data Hub. <p>For more information about as-of-dates and the submission date, see the CLER Carrier Enrollment File Layout or CLER Payroll Office Enrollment File Layout, as applicable. Payroll Offices please assure you are referencing version 3.3. These documents are available through the CLER Operations and Reconciliation Unit.</p>
3/10	<p>Reminders are emailed to the carriers that have not submitted their quarterly enrollment data.</p>
3/15	<p>This is the current quarterly due date (last day) for carriers and payroll offices to transmit their quarterly enrollment data to CLER. Please transmit your enrollment file immediately.</p>



Date (Month/Day)	Description
3/15	Enrollment data transmitted from carriers must be received by noon Eastern Standard Time (EST) at the OPM Data Hub on this date to be accepted for inclusion into the reconciliation process. Payroll office transmissions must be received at NFC by 5:00 p.m. Central Standard Time (CST) within 7 business days after the pay period end date . Any transmissions of enrollment data that are received after these times may not be included in the reconciliation process for this quarterly cycle. An email informing the submitter that the transmission is accepted or rejected is generated within 1 workday after receipt.
3/15	The OPM data hub provides CLER with the last files transmitted by carriers at approximately 3:00 p.m. (EST) .
3/15 - 3/19	The information required to produce discrepancy reports is processed and made available to Agencies and carriers through CLER, provided all Agencies and carriers submit their file by the deadline . The discrepancy report information will remain available until further notice. The Agencies have approximately 30 days to research discrepancies and respond with resolutions.
3/19	Lists of carriers and payroll offices that have not submitted their quarterly enrollment data are made available to OPM through CLER.
4/22	Reminders are emailed to the Agencies that responses are due on discrepancies by 8:00 a.m. (CST) on May 1 .
5/1	Responses from Agencies are due by 8:00 a.m. (CST) . <ul style="list-style-type: none"> If the research shows that the payroll or personnel office records are incorrect, the payroll or personnel office will correct the error(s) in their payroll/personnel system and enter the reconciliation reason code in CLER. If the research shows that the carrier's records are incorrect, the Agency will enter the results of their research in CLER for carrier correction. The Agency will submit supporting data through CLER or hard copy to the carrier.
5/1	On May 1 , after 8:00 a.m. (CST) , CLER will initiate the process of transferring the Corrective Action Request file to the OPM Data Hub for the retrieval of the file by carriers. CLER will notify carriers via email when the data is available after the OPM Data Hub has completed its processing.
5/1 - 5/31	Carriers enter Corrective Action Codes in CLER to indicate what actions were taken to resolve the discrepancies.
5/20	Reminders are emailed to the carriers that confirmation of the Corrective Actions must be completed by the beginning of the next month.



Formatting Enrollment Data Files for Transmission to CLER

For information about formatting enrollment data files for transmission to CLER, carriers should refer to the CLER Carrier Enrollment File Layout document. For a copy of this document, contact the CLER Operations and Reconciliation Unit at **1-855-632-4468**.



Viewing CLER Instructions

The Payroll Office option allows users to view payroll office records.

This section includes the following topics:

Viewing Payroll Office Information Records	19
Viewing and Maintaining Carrier Records	62
Viewing Reports.....	171

Viewing Payroll Office Information Records

The Info option on the Payroll Office Main Page allows users to view information about each payroll office.

To View a Payroll Office Information Record:

1. Select the **Payroll Office** tab at the top of the CLER Main Menu. The Payroll Office Main Page is displayed.

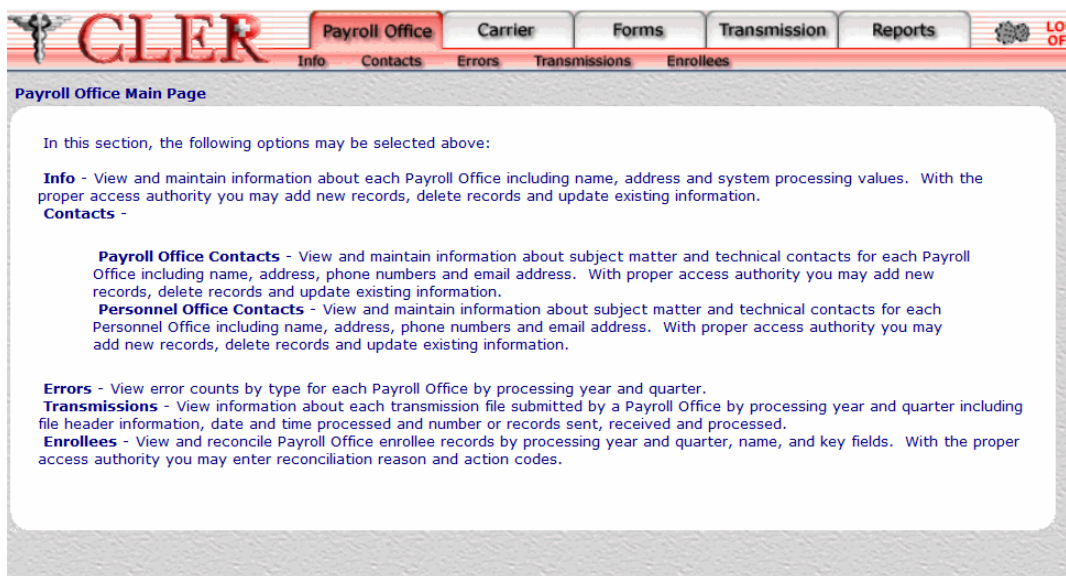


Figure 6: Payroll Office Main Page



2. Select **Info** at the top of the Payroll Office Main Page. The Payroll Office Information page is displayed.

Figure 7: Payroll Office Information Page

3. Complete the fields on the Payroll Office Information page as indicated and click **Submit**.

OR

Click **Reset** to clear all data entered.

Field	Instruction/Description
Payroll Office ID	<i>Optional, alphanumeric, 8 position</i> Enter the payroll office identification number.
Name	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the name of the payroll office.
City	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the name of the payroll office's city.
State	<i>Optional, alphanumeric, 2 positions maximum</i> Select the payroll office's, carrier's, carrier contact's, or carrier plan contact's State, U.S. territory, or overseas military abbreviation from the drop-down menu. Refer to the State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260) for a list and descriptions of State, U.S. territory, and overseas military abbreviations.



Field	Instruction/Description
Order By	<p><i>Optional, default</i></p> <p>Defaults to the ID sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values:</p> <p>ID - Search by payroll office identification number.</p> <p>Pay Cycle - Search by pay cycle.</p> <p>Name - Search by payroll office name.</p> <p>City - Search by payroll office city.</p>

- The Payroll Office Information Search Results page is displayed.

Figure 8: Payroll Office Information Search Results Page

Field	Description
ID	<p><i>System generated</i></p> <p>Displays the payroll office identification number.</p>
Name	<p><i>System generated</i></p> <p>Displays the name of the payroll office.</p>
Address	<p><i>System generated</i></p> <p>Displays the payroll office's street or post office box address.</p>
City	<p><i>System generated</i></p> <p>Displays the name of the payroll office's city.</p> <hr/> <p>Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.</p>



State	<i>System generated</i> Displays the payroll office's State, U.S. territory, or overseas military abbreviation. For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260).
Zip	<i>System generated</i> Displays the payroll office's ZIP Code.

5. Click **View** next to the applicable record. The Payroll Office Information View page is displayed.

Note: To view another record, click your browser's Back button to return to the Payroll Office Information Search Results page. Click **View** next to the applicable record.

The screenshot shows the 'Payroll Office Information View' page. At the top, there's a navigation bar with tabs: Payroll Office, Carrier, Forms, Transmission, Reports, and a LOG OFF button. Below the navigation bar, there's a sub-header 'Payroll Office Information View'. The main content area contains several input fields and dropdown menus. The fields are: Payroll Office ID (text), Name (text), Address (text), City (text), State (dropdown), Zip (text), Foreign Country (dropdown), Start Date (calendar), End Date (calendar), Error Threshold (text), Threshold Type (dropdown), and Transmission File Name (text). At the bottom, there's a 'Last Changed' section with ID, Date, and Time fields.

Figure 9: Payroll Office Information View Page

Field	Description
Payroll Office ID	<i>System generated</i> Displays the payroll office identification number.
Name	<i>System generated</i> Displays the name of the payroll office.



Address Line 1	<p><i>System generated</i></p> <p>Displays the first line payroll office's street or post office box address.</p>
Address Line 2	<p><i>System generated</i></p> <p>Displays the second line payroll office's street or post office box address.</p>
Address Line 3	<p><i>System generated</i></p> <p>Displays the third line payroll office's street or post office box address.</p>
City	<p><i>System generated</i></p> <p>Displays the name of the payroll office's city.</p> <hr/> <p>Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.</p> <hr/>
State	<p><i>System generated</i></p> <p>Displays the payroll office's State, U.S. territory, or overseas military abbreviation. For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260).</p>
Zip	<p><i>System generated</i></p> <p>Displays the payroll office's ZIP Code.</p>
Foreign Country	<p><i>System generated</i></p> <p>Displays the payroll office's country code. For a list and descriptions of country codes, see Country Codes Table (on page 262).</p>
Start Date	<p><i>System generated</i></p> <p>Displays the first date the payroll office will be valid.</p>
End Date	<p><i>System generated</i></p> <p>Displays the last date the payroll office will be valid.</p>
Error Threshold	<p><i>System generated</i></p> <p>Displays the number of percentage of errors permitted for the payroll office/carrier before a transmission file is rejected.</p>
Threshold Type	<p><i>System generated</i></p> <p>Displays the number measure of the error threshold. P represents percent and N represents number.</p>



Transmission File Name	<i>System generated</i> Displays the name of the quarterly transmission file sent by the payroll office.
Last Changed ID	<i>System generated</i> Displays the user ID number of the individual who made the most recent change to the record.
Last Changed Date	<i>System generated</i> Displays the date of the most recent change.
Last Changed Time	<i>System generated</i> Displays the time of the most recent change.

For more information see:

Viewing Payroll and Personnel Office Contact Records.....	24
Maintaining Payroll Office Enrollee Records (Marked with Discrepancy Code 163)	
.....	38
Viewing a Payroll Office Enrollee Record (Marked with Discrepancy Code 163)	38
Reconciling a Payroll Office Enrollee Record (Marked With Discrepancy Code 163)	
.....	54

Viewing Payroll and Personnel Office Contact Records

The Contacts option on the Payroll Office Main Page allows users to view information about subject matter and technical contacts for each payroll office and personnel office. This will aid users in communicating with each other to ensure the resolution of technical concerns related to the transmissions of the enrollment data as well as ensure the resolution of reconciliation matters.

For more information see:

Viewing a Payroll Office Contact Record	24
Viewing a Personnel Office Contact Record	31

Viewing a Payroll Office Contact Record

The View function allows users to view payroll office contact records.



To View a Payroll Office Contact Record:

1. Select the **Payroll Office** tab at the top of the CLER Main Menu.

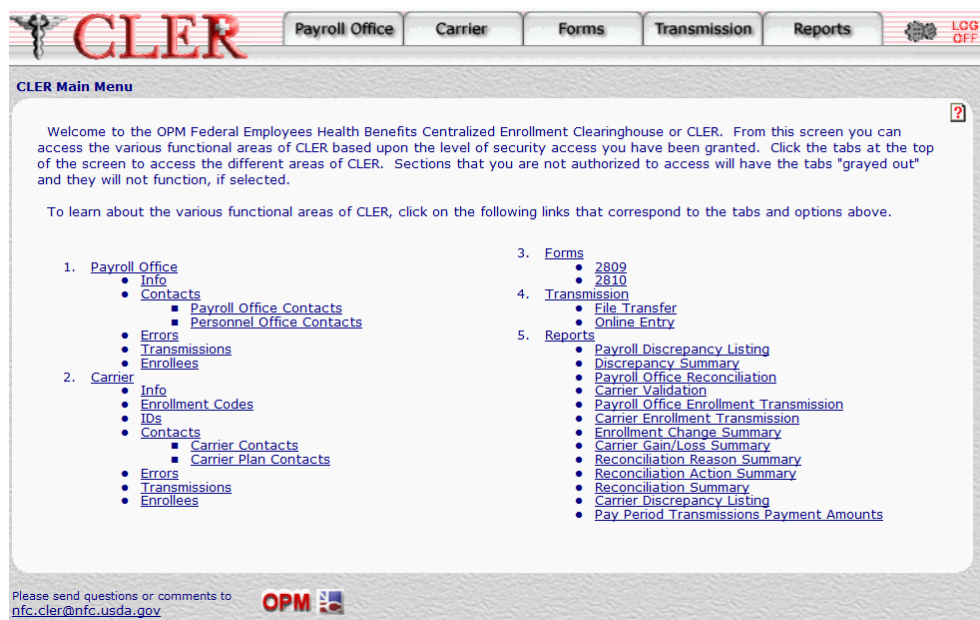


Figure 10: CLER Main Menu Page

2. The Payroll Office Main Page is displayed.

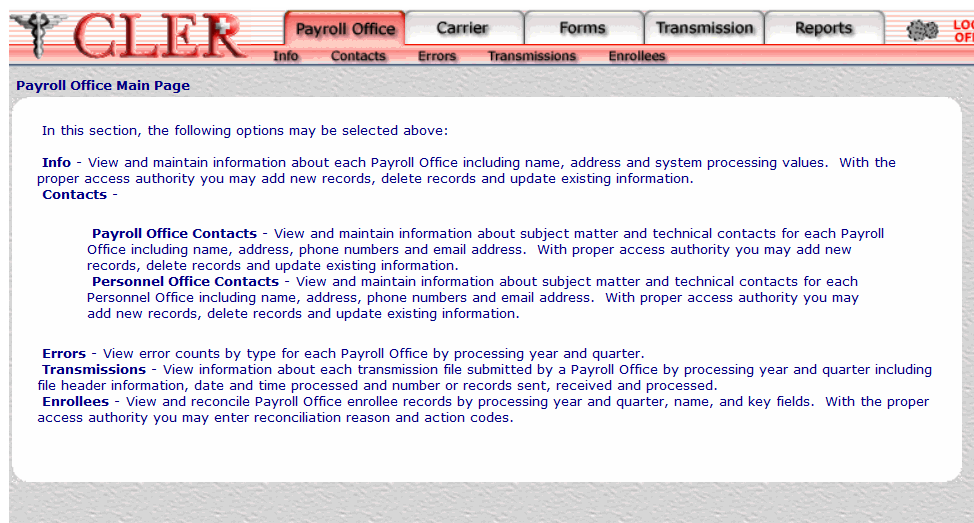


Figure 11: Contacts Main Page



3. Select **Contacts** at the top of the Payroll Office Main Page. The Contacts Main Page is displayed with the Payroll Office Contacts and Personnel Office Contacts options.

Figure 12: Contacts Main Page

4. Click the **Payroll Office Contacts** link to display the Payroll Office Contacts page.

Figure 13: Payroll Office Contacts Page

5. Complete the fields on the Payroll Office Contacts and select **Submit**.

OR

Select **Reset** to clear all data entered.

Field	Instruction/Description
Payroll Office ID	Optional, alphanumeric, 8 position Enter the payroll office identification number.



Field	Instruction/Description
Type	<i>Optional</i> Select either General for an administrative contact or Technical for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Display	<i>Optional, default</i> Defaults to All display option. Allows users to display search results by the options listed below. To choose a display option, select the radio button next to one of the following values: All - Displays all contacts for the payroll office ID and type code entered. Active - Displays active contacts for the payroll office ID and type code entered. Inactive - Displays inactive contacts for the payroll office ID and type code entered.
Order By	<i>Optional, default</i> Defaults to the ID sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values: ID - Search by ID number. Type - Search by type code.

6. The Payroll Office Contacts Search Results page is displayed.

Figure 14: Payroll Office Contacts Search Results Page

Field	Description
ID	<i>System generated</i> Displays the payroll office identification number.



Type	<i>System generated</i> Displays General type code to indicate that the payroll office contact holds an administrative position. Displays Technical type code to indicate that the payroll office contact holds a technical position.
Status	<i>System generated</i> Displays active to indicate that the record has been activated in CLER. Displays inactive to indicate that the record has been inactivated in CLER.
Name	<i>System generated</i> Displays the name of the payroll office contact.
Phone	<i>System generated</i> Displays the payroll office contact's telephone number.
Email	<i>System generated</i> Displays the payroll office contact's email address.

7. Click **View** next to the applicable record. The Payroll Office Contacts View page is displayed.



Note: To view another record, click your browser's Back button to return to the Payroll Office Contacts Search Results page. Click **View** next to the applicable record.

CLER Payroll Office Carrier Forms Transmission Reports LOG OFF

Info Contacts Errors Transmissions Enrollees

Payroll Office Contacts View

Use the browser Back arrow to select another record to view.

US DEPARTMENT OF AGRICULTURE

Payroll Office ID: [dropdown] Type: [General dropdown]

Role: PRIMARY CONTACT

Name: [text box]

Address: [text box]
CENTRALIZED ENROLLMENT RECON. (CLER)

City: [text box] State: [dropdown] Zip: [text box] Foreign Country: [dropdown]

Phone Number: [text box] Fax Number: [text box]

Email Address: [text box]

Remarks: PRODUCTION

Last Changed: ID [text box] Date 07/06/2012 Time 09:58:01

Figure 15: Payroll Office Contacts View Page

Field	Instruction/Description
Payroll Office ID	<i>System generated</i> Displays the payroll office identification number.
Type	<i>System generated</i> Displays General type code to indicate that the payroll office contact holds an administrative position. Displays Technical type code to indicate that the payroll office contact holds a technical position.
Role	<i>System generated</i> Displays the title, position, etc., of the payroll office contact/personnel office contact/carrier contact/carrier plan contact.
Address Line 1	<i>System generated</i> Displays the first line of the payroll office contact's street or post office box address.



Address Line 2	<i>System generated</i> Displays the second line of the carrier's street or post office box address.
Address Line 3	<i>System generated</i> Displays the third line of the payroll office contact's street or post office box address.
City	<i>System generated</i> Displays the name of the carrier's city. <u>Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.</u>
State	<i>System generated</i> Displays the payroll office contact's State, U.S. territory, or overseas military abbreviation. For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260).
Zip	<i>System generated</i> Displays the payroll office contact's ZIP Code.
Foreign Country	<i>System generated</i> Displays the carrier plan contact's country code. For a list and descriptions of country codes, see Country Codes Table (on page 262).
Phone	<i>System generated</i> Displays the payroll office contact's telephone number.
Fax Number	<i>System generated</i> Displays the payroll office contact's fax number.
Email	<i>System generated</i> Displays the payroll office contact's email address.
Remarks	<i>System generated</i> Displays the remarks about this record.
Last Changed ID	<i>System generated</i> Displays the user ID number of the individual who made the most recent change to the record.



Last Changed Date	<i>System generated</i> Displays the date of the most recent change.
Last Changed Time	<i>System generated</i> Displays the time of the most recent change.

Viewing a Personnel Office Contact Record

The View function allows users to view personnel office contact records.

To View a Personnel Office Contact Record:

1. Select the **Payroll Office** tab at the top of the CLER Main Menu.

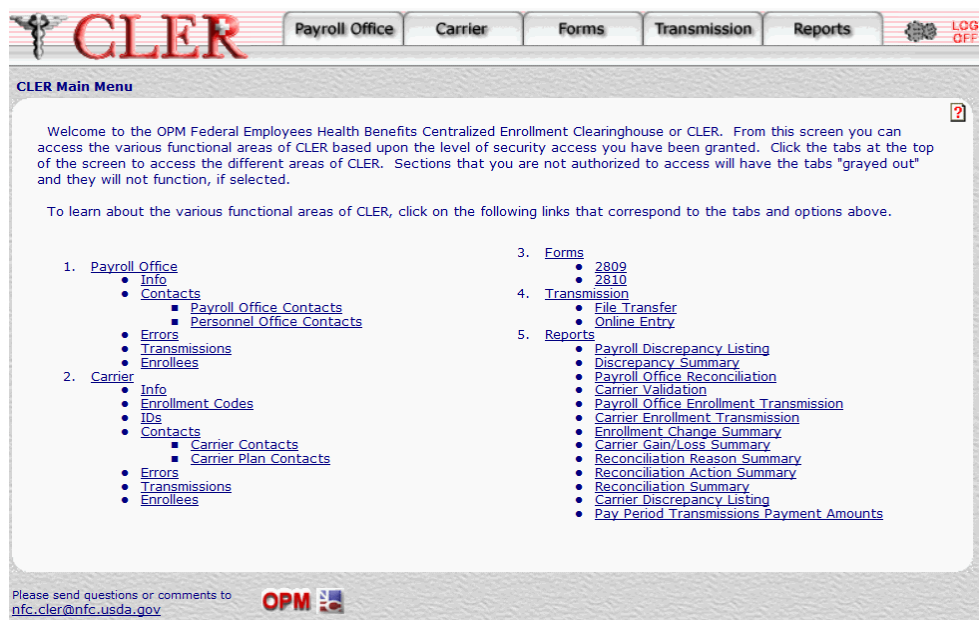


Figure 16: CLER Main Menu Page



2. The Payroll Office Main Page is displayed.

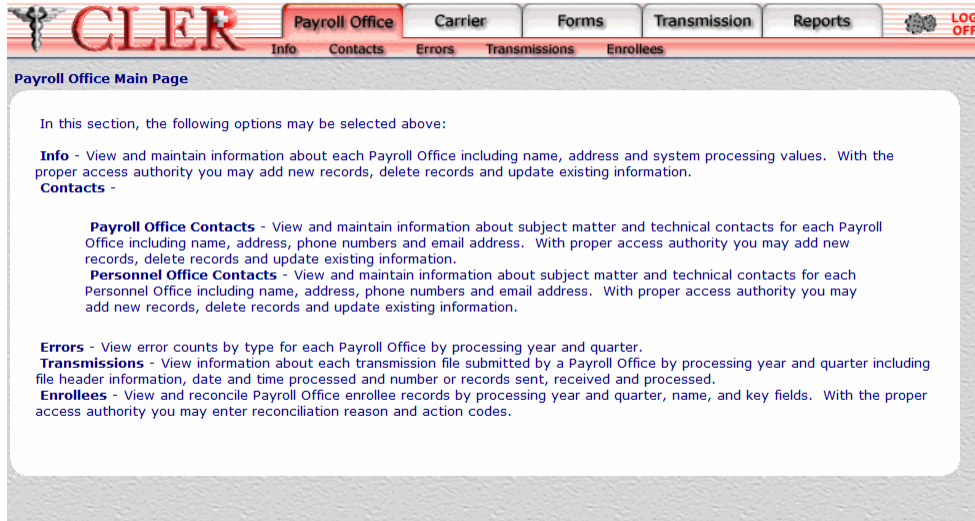


Figure 17: Payroll Office Main Page

3. Select **Contacts** on the Payroll Office Main Page. The Contacts Main Page is displayed with the Payroll Office Contacts and Personnel Office Contacts options.

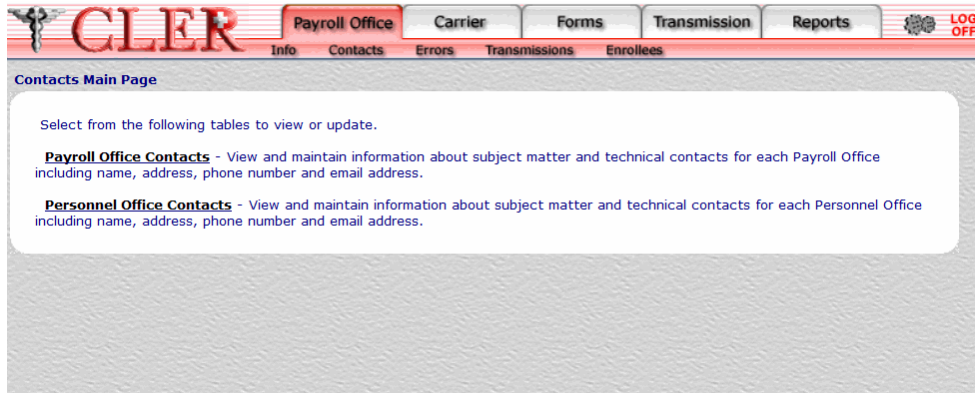


Figure 18: Contacts Main Page



- Click the **Personnel Office Contacts** link on the Contacts Main Page to display the Personnel Office Contacts page.

Figure 19: Personnel Office Contacts Record

- Complete the fields on the Personnel Office Contacts page and click **Submit**.

OR

Click **Reset** to clear all data entered.

Field	Instruction/Description
Payroll Office ID	<i>Optional, alphanumeric, 8 position</i> Enter the payroll office identification number.
Personnel Office ID	<i>Optional, alphanumeric, 4 positions</i> Enter the personnel office identification (POI) number.
Type	<i>Optional</i> Select either General for an administrative contact or Technical for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.



Field	Instruction/Description
Display	<p><i>Optional, default</i></p> <p>Defaults to All display option. Allows users to display search results by the options listed below. To choose a display option, select the radio button next to one of the following values:</p> <p>All - Displays all contacts for the payroll office ID and type code entered.</p> <p>Active - Displays active contacts for the payroll office ID and type code entered.</p> <p>Inactive - Displays inactive contacts for the payroll office ID and type code entered.</p>
Order By	<p><i>Optional, default</i></p> <p>Defaults to the ID sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values:</p> <p>ID - Search by payroll office identification number.</p> <p>POI - Search by personnel office identification number.</p> <p>Type - Search by type code.</p>

6. The Personnel Office Contacts Search Results page is displayed.

Figure 20: Personnel Office Contacts Search Results Page

Field	Description
ID	<p><i>System generated</i></p> <p>Displays the payroll office identification number.</p>



POI	<p><i>System generated</i></p> <p>Displays the POI number.</p> <hr/> <p>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Discrepancy Listing page.</p> <hr/>
Type	<p><i>System generated</i></p> <p>Displays General type code to indicate that the payroll office contact holds an administrative position.</p> <p>Displays Technical type code to indicate that the payroll office contact holds a technical position.</p>
Status	<p><i>System generated</i></p> <p>Displays active to indicate that the record has been activated in CLER.</p> <p>Displays inactive to indicate that the record has been inactivated in CLER.</p>
Name	<p><i>System generated</i></p> <p>Displays the name of the personnel office contact.</p>
Phone	<p><i>System generated</i></p> <p>Displays the carrier contact's telephone number.</p>
Email	<p><i>System generated</i></p> <p>Displays the personnel office contact's email address.</p>

- Click **View** next to the applicable record. The Personnel Office Contacts View page is displayed.



Note: To view another record, click your browser's Back button to return to the Personnel Office Contacts Search Results page. Click **View** next to the applicable record.

Figure 21: Personnel Office Contacts View Page

Field	Description
Payroll Office ID	<i>System generated</i> Displays the payroll office identification number.
Personnel Office ID	<i>System generated</i> Displays the personnel office identification number.
Type	<i>System generated</i> Displays General type code to indicate that the payroll office contact holds an administrative position. Displays Technical type code to indicate that the payroll office contact holds a technical position.
Role	<i>System generated</i> Displays the title, position, etc., of the payroll office contact/personnel office contact/carrier contact/carrier plan contact.



Name	<p><i>System generated</i></p> <p>Displays the name of the personnel office contact.</p>
Address Line 1	<p><i>System generated</i></p> <p>Displays the first line of the personnel office contact's street or post office box address.</p>
Address Line 2	<p><i>System generated</i></p> <p>Displays the second line of the personnel office contact's street or post office box address.</p>
Address Line 3	<p><i>System generated</i></p> <p>Displays the third line of the personnel office contact's street or post office box address.</p>
City	<p><i>System generated</i></p> <p>Displays the name of the personnel office contact's city.</p> <hr/> <p>Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.</p> <hr/>
State	<p><i>System generated</i></p> <p>Displays the personnel office contact's State, U.S. territory, or overseas military abbreviation. For a list and descriptions of State, U.S. territory, and overseas military abbreviations, State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260).</p>
Zip	<p><i>System generated</i></p> <p>Displays the personnel office contact's ZIP Code.</p>
Foreign Country	<p><i>System generated</i></p> <p>Displays the personnel office contact's country code. For a list and descriptions of country codes, see Country Codes Table (on page 262).</p>
Phone Number	<p><i>System generated</i></p> <p>Displays the carrier plan contact's telephone number.</p>
Fax Number	<p><i>System generated</i></p> <p>Displays the personnel office contact's fax number.</p>
Email Address	<p><i>System generated</i></p> <p>Displays the personnel office contact's email address.</p>



Remarks	<i>System generated</i> Displays the remarks about this record.
Last Changed ID	<i>System generated</i> Displays the user ID number of the individual who made the most recent change to the record.
Last Changed Date	<i>System generated</i> Displays the date of the most recent change.
Last Changed Time	<i>System generated</i> Displays the time of the most recent change.

Maintaining Payroll Office Enrollee Records (Marked with Discrepancy Code 163)

The Enrollees option on the Payroll Office Main Page allows carrier users to view and reconcile payroll office enrollee records marked with Discrepancy Code 163. For a description of Discrepancy Code 163, see ***Discrepancy Codes Table*** (on page 251).

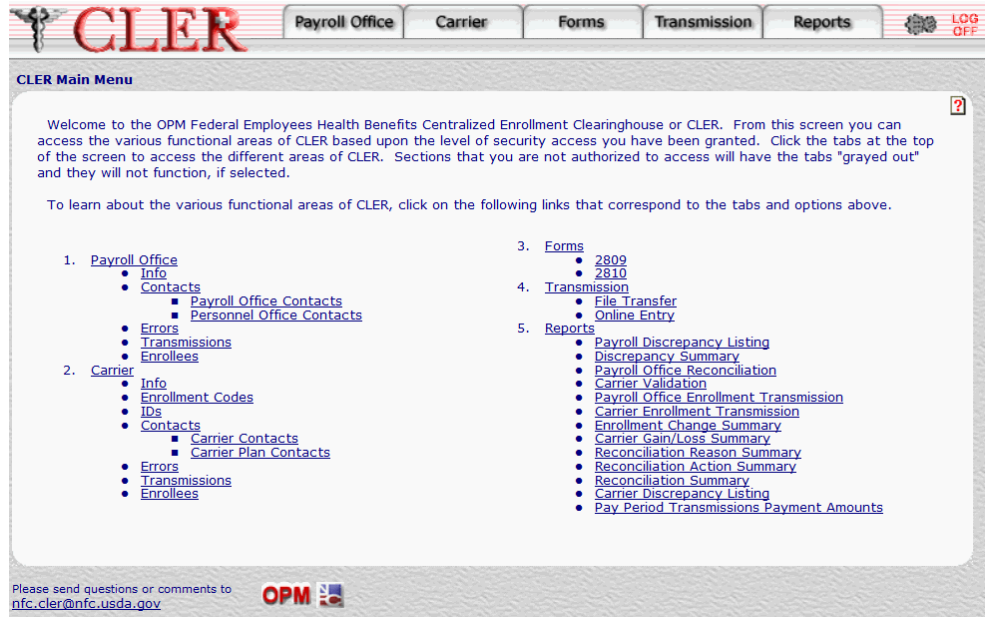
Note: Agency users are able to view and validate carrier enrollee records marked with Discrepancy Code 160. Thus, the Validate function allows Agency users to communicate with carriers about carrier enrollee records marked with Discrepancy Code 160. For a description of Discrepancy Code 160, see ***Discrepancy Codes Table*** (on page 251).

Viewing a Payroll Office Enrollee Record (Marked with Discrepancy Code 163)

The view function allows carrier users to view payroll office enrollee records marked with Discrepancy Code 163. For a description of Discrepancy Code 163, see ***Discrepancy Codes Table*** (on page 251).

To View a Payroll Office Enrollee Record Marked with Discrepancy Code 163:

1. Select the **Payroll Office** tab at the top of the CLER Main Menu.



2. The Payroll Office Main Page is displayed.

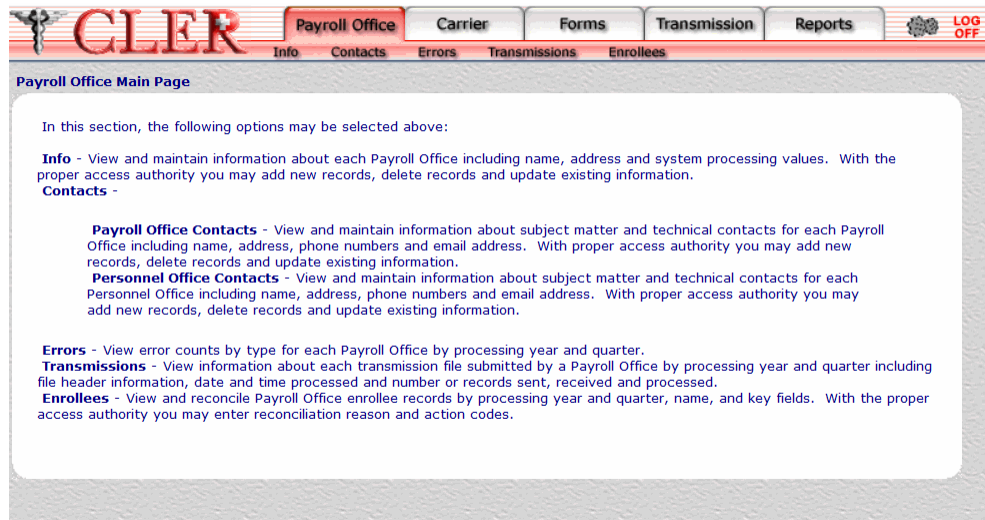


Figure 22: Payroll Office Main Page



3. Select **Enrollees** at the top of the Payroll Office Main Page. The Payroll Office Enrollees page is displayed.

Figure 23: Payroll Office Enrollees Page

4. Complete the fields on the Payroll Office Enrollees page and click **Submit**.

OR

Click **Reset** to clear all data entered.

Field	Instruction/Description
Payroll Office ID*	<i>Required</i> Select the payroll office identification number from the drop-down menu.
Year*	<i>Required, default</i> Select the reconciliation year from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Quarter*	<i>Required default</i> Select the reconciliation quarter from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.



Field	Instruction/Description
Agency	<p><i>Optional, alphanumeric, 4 positions</i></p> <p>Enter the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).</p>
POI	<p><i>Optional, alphanumeric, 4 positions</i></p> <p>Enter the POI of the office where the enrollee's records are maintained.</p>
Carrier	<p><i>Optional, alphanumeric, 4 positions</i></p> <p>Enter your company's carrier code. Only the carrier code for your company should be entered in this field. If the carrier code is not entered, this field defaults to your company's carrier code.</p>
Enrollment Code	<p><i>Optional, alphanumeric, 3 positions</i></p> <p>Enter the enrollment/carrier enrollment code.</p>
SSN - From	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a specific enrollee record by Social Security number (SSN), enter the SSN and skip the To field.</p> <p>To search for a range of enrollee records by a range of SSNs, enter the SSN that starts the range, then proceed to the To field.</p> <hr/> <p>Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p>
SSN - To	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a range of enrollee records by a range of SSNs, enter the SSN that ends the range; otherwise, leave blank.</p> <hr/> <p>Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p>



Field	Instruction/Description
Other ID - From	<p><i>Optional, alphanumeric, 15 positions maximum</i></p> <p>To search for a specific enrollee record by Other ID, enter the Other ID and skip the To field.</p> <p>To search for a range of enrollee records by a range of Other IDs, type the Other ID that starts the range, then go to the To field.</p> <hr/> <p>Note for RSP: Enter the civil service annuitant (CSA) or civil service final (CSF) identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXXXX, and the CSF identifier is typed as FXXXXXXXXX.</p> <hr/> <p>These fields are used by the RSP and OWCP. RSP personnel use these fields to search for enrollee records by CSA or CSF identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.</p> <hr/> <p>Note: A search for enrollee records by complete Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p> <hr/>
Other ID - To	<p><i>Optional, alphanumeric, 15 positions maximum</i></p> <p>To search for a range of enrollee records by a range of Other IDs, enter the Other ID that ends the range; otherwise, leave blank.</p> <hr/> <p>Note for RSP: Enter the CSA or CSF identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXXXX, and the CSF identifier is typed as FXXXXXXXXX.</p> <hr/> <p>These fields are used by the RSP and OWCP. RSP personnel use these fields to search for enrollee records by CSA or CSF identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.</p> <hr/> <p>Note: A search for enrollee records by complete Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p> <hr/>



Field	Instruction/Description
Last Name	<p><i>Optional, alphanumeric, 25 positions maximum</i></p> <p>Enter the enrollee's last name. If the enrollee has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III). If there is a case of an enrollee having only one name, enter that one name in this field.</p>
First Name	<p><i>Optional, alphanumeric, 12 positions maximum</i></p> <p>Enter the enrollee's first name. This must be provided with the exception of an enrollee with only one name.</p>
Middle Name	<p><i>Optional, alphanumeric, 12 positions maximum</i></p> <p>Enter the enrollee's middle name/initial.</p>
Display (Payroll Office Enrollees)	<p><i>Optional, default</i></p> <p>Defaults to All display. This field allows users to display search results by the options listed below. To choose a display option, select the radio button next to one of the following values:</p> <p>All Records - Displays all records related to the search criteria.</p> <p>Matches - Displays all matched records related to the search criteria.</p> <p>No Matches - Displays records with no matches related to the search criteria. No Matches are discrepancies where the carrier record is not found.</p> <p>Discrepancies - Displays all records with discrepancies related to the search criteria.</p> <p>Warnings - Displays all records with warnings related to the search criteria.</p> <p>Unreconciled - Displays all records with unreconciled discrepancies related to the search criteria. Unreconciled discrepancies are discrepancies where the payroll office has not entered a reconciliation reason or reconciliation action code.</p> <p>Reconciled - Displays all records with reconciled discrepancies related to the search criteria.</p> <p>Confirmed - Displays all records with confirmed discrepancies related to the search criteria. Confirmed discrepancies are discrepancies where the carrier is in agreement with the payroll office's reconciliation reason and reconciliation action.</p> <p>Disputed - Displays all records with disputed discrepancies related to the search criteria. Disputed discrepancies are discrepancies where the carrier is not in agreement with the payroll office's reconciliation reason and reconciliation action.</p> <p>Not Validated - Displays all records with discrepancies that are not validated. Not Validated discrepancies are discrepancies that the carrier has not yet agreed that the Agency's reconciliation reason and actions are correct.</p>



Field	Instruction/Description
Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Name sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>
Order By: 2nd	<p><i>Optional, default</i></p> <p>Defaults to the SSNO sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>



Field	Instruction/Description
Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>
Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>



Field	Instruction/Description
Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>
Order By: 6th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>



- The Payroll Office Enrollees Search Results page is displayed showing the payroll office enrollee records. Only payroll office enrollee records marked with **Discrepancy Code 163** are displayed.

Figure 24: Payroll Office Enrollees Search Results Page

Note: The Payroll Office Enrollees Search Results (Other ID) page is displayed when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.

Figure 25: Payroll Office Enrollees Search Results (Other ID) Page

Field	Description
Payroll Office ID	<i>System generated</i> Displays the payroll office identification number.
Year	<i>System generated</i> Displays the reconciliation year.
Quarter	<i>System generated</i> Displays the reconciliation quarter.

Other ID Only Page



Other ID	<i>System generated</i> Used by the RSP and OWCP. RSP personnel use this field to reference an enrollee's civil service annuitant or civil service final identifier. OWCP personnel use this field to reference an enrollee's claim identifier. <u>Note: The Agency and POI fields are displayed in lieu of this field when a payroll office identification number other than 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.</u>
Enrollee SSN	<i>System generated</i> Displays the enrollee's SSN.
Last Name	<i>System generated</i> Displays the enrollee's last name.
First Name	<i>System generated</i> Displays the enrollee's first name.
Carrier	<i>System generated</i> Displays the carrier code.
Code	<i>System generated</i> Displays the enrollment code.

Enrollees Search Results Page Only

Field	Description
Agency	<i>System generated</i> Displays the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer). <u>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.</u>
POI	<i>System generated</i> Displays the POI of the office where the enrollee's records are maintained. <u>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.</u>



Discrepancies	<p><i>System generated</i></p> <p>Displays Discrepancy Code 163. For a detailed explanation of Discrepancy Code 163, see Discrepancy Codes Table (on page 251).</p> <hr/> <p>Note: Check marks are displayed next to discrepancy codes that have been addressed by Agencies and carriers. Red check marks are displayed next to discrepancies that have been addressed by Agencies. Green check marks are displayed next to discrepancies that have been addressed by carriers. To display the most current check marks, select Refresh at the top of the Payroll Office Enrollees Search Results page.</p> <hr/>
Fail Count	<p><i>System generated</i></p> <p>Displays the number of times this record has failed the quarterly edit process.</p>

6. Click **View** next to the applicable record. The Payroll Office Enrollees View page is displayed showing the selected payroll office enrollee record.



Note: To view another record, click your browser's Back button to return to the Payroll Office Enrollees Search Results page. Click **View** next to the applicable record.

CLER Payroll Office Enrollees View

Use the browser Back arrow to select another record to view.

Payroll Office ID: 00000000 Year: 2004 Quarter: 1 Submission: 1

Agency: XX00 POI: 0000 Carrier: XXXX Enrollment Code: 000 SSN: 000000000

Last Name: Doe First Name: John Middle Name:

Effective Date: Amount: 422.47

Deceased Annuitant SSN: Pseudo SSN: Other Payroll ID: Other Carrier ID:

Submitter Use #1: Submitter Use #2: Submitter Use #3:

Date Processed: 03/10/2004 Time Processed: 22:31:28 Source: Fail Count: 7

Select another discrepancy: 1 2

Discrepancy: 163 - Enrollee On Your Payroll Office Record, But No Carrier Explain

Reconciliation Reason: 521 - Carrier Did Not Process 2809 Or 2810 Correctly Explain

Reconciliation Action: 611 - Carrier Correction Required - Submitted By Payroll/Per Explain

Corrective Action:

Payroll Office Comments (400 character max): Carrier Comments (400 character max):

Last Payroll Update: ID: XX000 Date: 03/31/2004 Time: 11:27:26

Last Carrier Update:

Figure 26: Payroll Office Enrollees View Page

Field	Instruction/Description
Payroll Office ID	<i>System generated</i> Displays the payroll office identification number.
Year	<i>System generated</i> Displays the reconciliation year.
Quarter	<i>System generated</i> Displays the reconciliation quarter.



Field	Instruction/Description
Submission	<i>System generated</i> Displays the transmission submission for this enrollee record.
Agency	<i>System generated</i> Displays the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer). <u>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.</u>
POI	<i>System generated</i> Displays the POI of the office where the enrollee's records are maintained. <u>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.</u>
Carrier	<i>System generated</i> Displays the carrier code.
Enrollment Code	<i>System generated</i> Displays the enrollment code/carrier enrollment code.
SSN	<i>System generated</i> Displays the enrollee's SSN.
Last Name	<i>System generated</i> Displays the enrollee's last name.
First Name	<i>System generated</i> Displays the enrollee's first name.
Middle Name	<i>System generated</i> Displays the enrollee's middle name or initial.
Effective Date	<i>System generated</i> Displays the effective date of the enrollment.
Amount	<i>System generated</i> Displays the enrollee's withholding/premium.



Field	Instruction/Description
Deceased Annuitant SSN	<i>System generated</i> Displays the deceased annuitant enrollee's SSN.
Pseudo SSN	<i>System generated</i> Displays the pseudo SSN used by the Agency and carrier to identify the enrollee.
Other Payroll ID	<i>System generated</i> Displays an identifier used by the Agency to identify the enrollee.
Other Carrier ID	<i>System generated</i> Displays an identifier used by the carrier to identify the enrollee.
Submitter Use #1	<i>System generated</i> Displays remarks that were entered by the organization that created the record/enrollment record.
Submitter Use #2	<i>System generated</i> Displays remarks that were entered by the organization that created the record/enrollment record.
Submitter Use #3	<i>System generated</i> Displays remarks that were entered by the organization that created the record/enrollment record.
Date Processed	<i>System generated</i> Displays the date the record was processed.
Time Processed	<i>System generated</i> Displays the time the record was processed (using military time).
Source	<i>System generated</i> Displays the source of transmission data indicator. The value in the first position equals M for mainframe or S for server. The value in the second position equals T for transmission or M for manual entry.
Fail Count	<i>System generated</i> Displays the number of times this record has failed the quarterly edit process.
Select another discrepancy	<i>Optional</i> Select each discrepancy number to view the corresponding code and message if multiple discrepancies are shown.



Field	Instruction/Description
Discrepancy	<p><i>System generated</i></p> <p>Displays Discrepancy Code 163. A short description is displayed next to the code. To view a detailed explanation of this code, click Explain or see Discrepancy Codes Table (on page 251).</p>
Reconciliation Reason	<p><i>System generated</i></p> <p>Displays the code that identifies the cause of a discrepancy as reported by the Agency. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Reason Codes Table (on page 255).</p>
Reconciliation Action	<p><i>System generated</i></p> <p>Displays the code that identifies the action requested by the Agency to resolve a discrepancy. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Action Codes Table (on page 258).</p>
Corrective Action	<p><i>System generated</i></p> <p>Displays the code that identifies the carrier's response to the reconciliation action code displayed in the Reconciliation Action field. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Carrier Corrective Action Response Codes Table (on page 259).</p>
Payroll Office Comments	<p><i>System generated</i></p> <p>Displays the payroll office's or Agency's comments.</p>
Carrier Comments	<p><i>System generated</i></p> <p>Displays the carrier's comments.</p>
Last Payroll Update ID	<p><i>System generated</i></p> <p>Displays the user ID number of the payroll office representative who made the most recent change to the record.</p>
Last Payroll Update Date	<p><i>System generated</i></p> <p>Displays the date of the most recent change.</p>
Last Payroll Update Time	<p><i>System generated</i></p> <p>Displays the time of the most recent change.</p>
Last Carrier Update ID	<p><i>System generated</i></p> <p>Displays the user ID number of the carrier representative/individual who made the most recent change to the record.</p>



Field	Instruction/Description
Last Carrier Update Date	<i>System generated</i> Displays the date of the most recent change.
Last Carrier Update Time	<i>System generated</i> Displays the the time of the most recent change.

Reconciling a Payroll Office Enrollee Record (Marked With Discrepancy Code 163)

The reconcile function allows carrier users to communicate with payroll offices about payroll office enrollee records marked with Discrepancy Code 163. For a description of Discrepancy Code 163, see *Discrepancy Codes Table* (on page 251).

To Reconcile a Payroll Office Enrollee Record Marked with Discrepancy Code 163:

1. Select the **Payroll Office** tab at the top of the CLER Main.

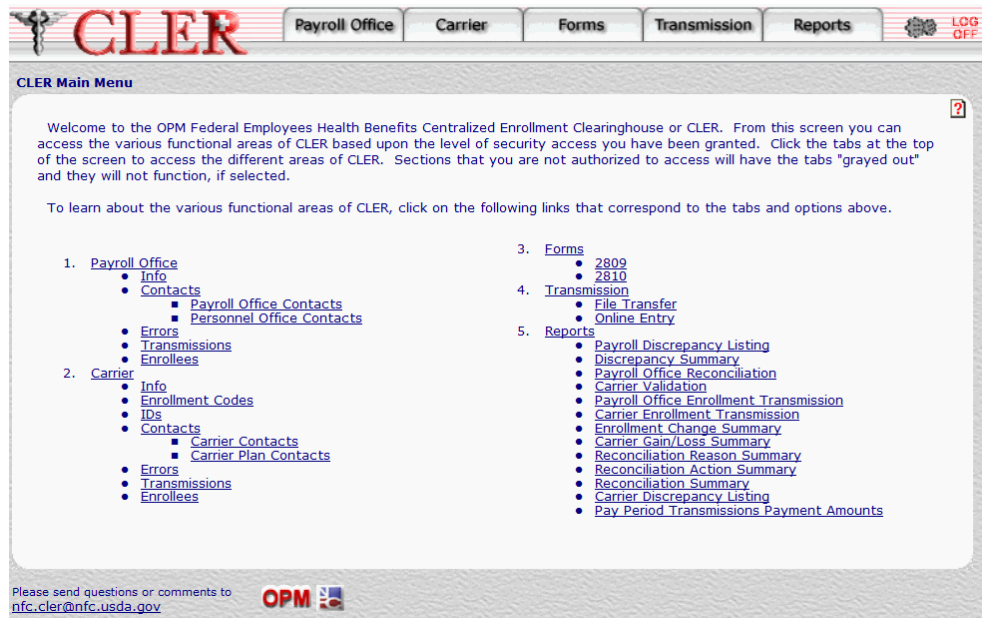


Figure 27: CLER Main Menu Page



- The Payroll Office Main Page is displayed.

Payroll Office Main Page

In this section, the following options may be selected above:

- Info** - View and maintain information about each Payroll Office including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.
- Contacts** -
 - Payroll Office Contacts** - View and maintain information about subject matter and technical contacts for each Payroll Office including name, address, phone numbers and email address. With proper access authority you may add new records, delete records and update existing information.
 - Personnel Office Contacts** - View and maintain information about subject matter and technical contacts for each Personnel Office including name, address, phone numbers and email address. With proper access authority you may add new records, delete records and update existing information.
- Errors** - View error counts by type for each Payroll Office by processing year and quarter.
- Transmissions** - View information about each transmission file submitted by a Payroll Office by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.
- Enrollees** - View and reconcile Payroll Office enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter reconciliation reason and action codes.

Figure 28: Payroll Office Main Page

- Select **Enrollees** at the top of the Payroll Office Main Page. The Payroll Office Enrollees page is displayed.

Payroll Office Enrollees

Enter selection criteria in the following fields and click the SUBMIT button to search for records based on your entries. Fields marked with * are required.

Payroll Office ID* Year* Quarter*

00000000 2004 1

Agency POI Carrier Enrollment Code SSN - from SSN - to Other ID From Other ID To

Last Name First Name Middle Name

Doe John

Display: All Records ☒ Matches ☐ No Matches ☐ Discrepancies ☐ Warnings ☐
Unreconciled ☐ Reconciled ☐ Confirmed ☐ Disputed ☐ Not Validated ☐

Order By: 1st Name 2nd SSNO 3rd
4th 5th 6th

SUBMIT RESET

Figure 29: Payroll Office Enrollees Page

- Complete the fields on the Payroll Office Enrollees page and click **Submit**.

OR

Click **Reset** to clear all data entered.



5. The Payroll Office Enrollees Search Results page is displayed showing the payroll office enrollee records. Only payroll office enrollee records marked with Discrepancy Code 163 are displayed.

Note: The Payroll Office Enrollees Search Results (Other ID) page is displayed when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.

Figure 30: Payroll Office Enrollees Search Results Page

Field	Description
Payroll Office ID	<i>System generated</i> Displays the payroll office identification number.
Year	<i>System generated</i> Displays the reconciliation year.
Quarter	<i>System generated</i> Displays the reconciliation quarter.
Enrollee SSN	<i>System generated</i> Displays the enrollee's SSN.
Last Name	<i>System generated</i> Displays the enrollee's last name.
First Name	<i>System generated</i> Displays the enrollee's first name.
Carrier	<i>System generated</i> Displays the carrier code.
Code	<i>System generated</i> Displays the enrollment code submitted by the payroll office/carrier.



Agency	<p><i>System generated</i></p> <p>Displays the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).</p> <hr/> <p>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.</p>
POI	<p><i>System generated</i></p> <p>Displays the POI of the office where the enrollee's records are maintained.</p> <hr/> <p>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.</p>
Discrepancies	<p><i>System generated</i></p> <p>Displays Discrepancy Code 163. For a detailed explanation of Discrepancy Code 163, see Discrepancy Codes Table (on page 251).</p> <hr/> <p>Note: Check marks are displayed next to discrepancy codes that have been addressed by Agencies and carriers. Red check marks are displayed next to discrepancies that have been addressed by Agencies. Green check marks are displayed next to discrepancies that have been addressed by carriers. To display the most current check marks, select Refresh at the top of the Payroll Office Enrollees Search Results page.</p>
Fail Count	<p><i>System generated</i></p> <p>Displays the number of times this record has failed the quarterly edit process.</p>



- Click **Reconcile** next to the applicable record. The Carrier Enrollees Reconcile page is displayed showing the selected payroll office enrollee record.

Figure 31: Carrier Enrollees Reconcile Page

- Complete the fields on the Carrier Enrollees Reconcile page and click **Reconcile Record**. If no errors occur, a pop-up message is displayed to confirm the record has been reconciled.

Field	Instruction/Description
Payroll Office ID	<i>System generated</i> Displays the payroll office identification number.
Year	<i>System generated</i> Displays the reconciliation year.



Quarter	<p><i>System generated</i></p> <p>Displays the reconciliation quarter.</p>
Submission	<p><i>System generated</i></p> <p>Displays the transmission submission for this enrollee record.</p>
Agency	<p><i>System generated</i></p> <p>Displays the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).</p> <hr/> <p>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.</p>
POI	<p><i>System generated</i></p> <p>Displays the POI of the office where the enrollee's records are maintained.</p> <hr/> <p>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.</p>
Carrier	<p><i>System generated</i></p> <p>Displays the carrier code.</p>
Enrollment Code	<p><i>System generated</i></p> <p>Displays the enrollment code/carrier enrollment code.</p>
SSN	<p><i>System generated</i></p> <p>Displays the enrollee's SSN.</p>
Last Name	<p><i>System generated</i></p> <p>Displays the enrollee's last name.</p>
First Name	<p><i>System generated</i></p> <p>Displays the enrollee's first name.</p>
Middle Name	<p><i>System generated</i></p> <p>Displays the enrollee's middle name or initial.</p>
Effective Date	<p><i>System generated</i></p> <p>Displays the effective date of the enrollment.</p>



Amount	<i>System generated</i> Displays the enrollee's withholding/premium.
Deceased Annuitant SSN	<i>System generated</i> Displays the deceased annuitant enrollee's SSN.
Pseudo SSN	<i>System generated</i> Displays the pseudo SSN used by the Agency and carrier to identify the enrollee.
Other Payroll ID	<i>System generated</i> Displays an identifier used by the Agency to identify the enrollee.
Other Carrier ID	<i>System generated</i> Displays an identifier used by the carrier to identify the enrollee.
Submitter Use #1	<i>System generated</i> Displays remarks that were entered by the organization that created the record/enrollment record.
Submitter Use #2	<i>System generated</i> Displays remarks that were entered by the organization that created the record/enrollment record.
Submitter Use #3	<i>System generated</i> Displays remarks that were entered by the organization that created the record/enrollment record.
Date Processed	<i>System generated</i> Displays the date the record was processed.
Time Processed	<i>System generated</i> Displays the time the record was processed (using military time).
Source	<i>System generated</i> Displays the source of transmission data indicator. The value in the first position equals M for mainframe or S for server. The value in the second position equals T for transmission or M for manual entry.
Fail Count	<i>System generated</i> Displays the number of times this record has failed the quarterly edit process.



Select another discrepancy	<p><i>Optional</i></p> <p>Select each discrepancy number to view the corresponding code and message if multiple discrepancies are shown.</p>
Discrepancy	<p><i>System generated</i></p> <p>Displays Discrepancy Code 163. A short description is displayed next to the code. To view a detailed explanation of this code, click Explain or see Discrepancy Codes Table (on page 251).</p>
Reconciliation Reason	<p><i>System generated</i></p> <p>Displays the code that identifies the cause of a discrepancy as reported by the Agency. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Reason Codes Table (on page 255).</p>
Reconciliation Action	<p><i>System generated</i></p> <p>Displays the code that identifies the action requested by the Agency to resolve a discrepancy. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Action Codes Table (on page 258).</p>
Corrective Action*	<p><i>System generated</i></p> <p>Click from the drop-down menu and select. Displays the code that identifies the carrier's response to the reconciliation action code displayed in the Reconciliation Action field. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Carrier Corrective Action Response Codes Table (on page 259).</p>
Payroll Office Comments	<p><i>System generated</i></p> <p>Displays the payroll office's or Agency's comments.</p>
Carrier Comments	<p><i>Conditional, alphanumeric, 400 positions maximum</i></p> <p>Enter comments about this record.</p> <hr/> <p>Note: If 724 was selected in the Corrective Action field, comments explaining the corrective action must be entered in this field.</p> <hr/>
Last Payroll Update ID	<p><i>System generated</i></p> <p>Displays the user ID number of the payroll office representative who made the most recent change to the record.</p>
Last Payroll Update Date	<p><i>System generated</i></p> <p>Displays the date of the most recent change.</p>



Last Payroll Update Time	<i>System generated</i> Displays the time of the most recent change.
Last Carrier Update ID	<i>System generated</i> Displays the user ID number of the carrier representative/individual who made the most recent change to the record.
Last Carrier Update Date	<i>System generated</i> Displays the date of the most recent change.
Last Carrier Update Time	<i>System generated</i> Displays the the time of the most recent change.

8. Click **OK** to close the pop-up.

Note: To reconcile another record, click **Cancel** to return to the Payroll Office Enrollees Search Results page. Click **Reconcile** next to the applicable record.

Viewing and Maintaining Carrier Records

The Carrier option allows users to view and maintain information about each carrier office. With proper access authority, new records may be added and current records may be updated or deleted.

For more information see:

Viewing Carrier Information Records	62
Maintaining Carrier and Carrier Plan Contact Records	77
Maintaining Carrier Transmission Records	122
Maintaining Carrier Enrollee Records.....	131

Viewing Carrier Information Records

The Info option on the Carrier Main Page allows users to view information about each carrier office.



To View a Carrier Information Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

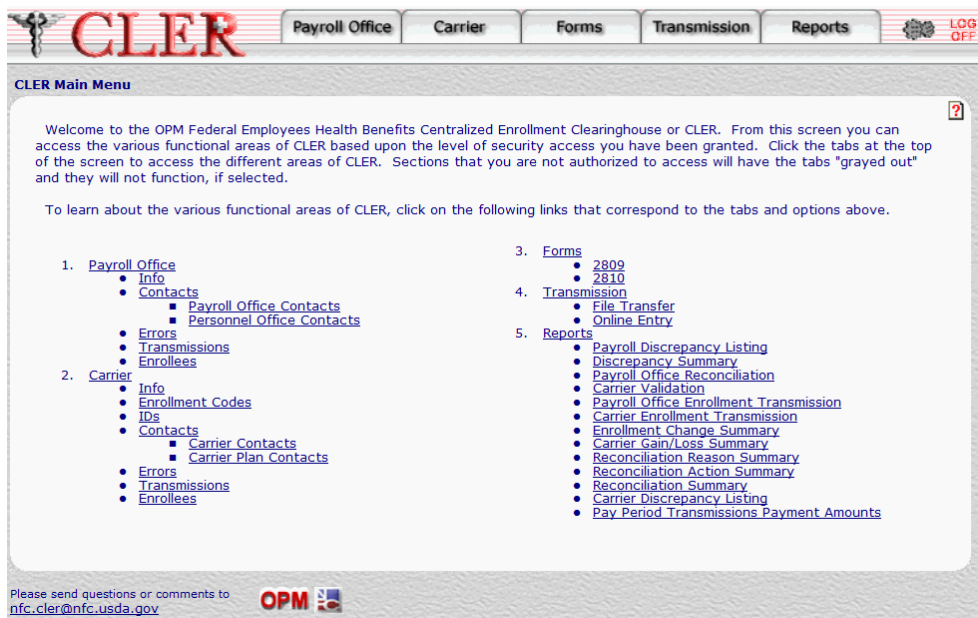


Figure 32: CLER Main Menu Page

2. The Carrier Main Page is displayed.

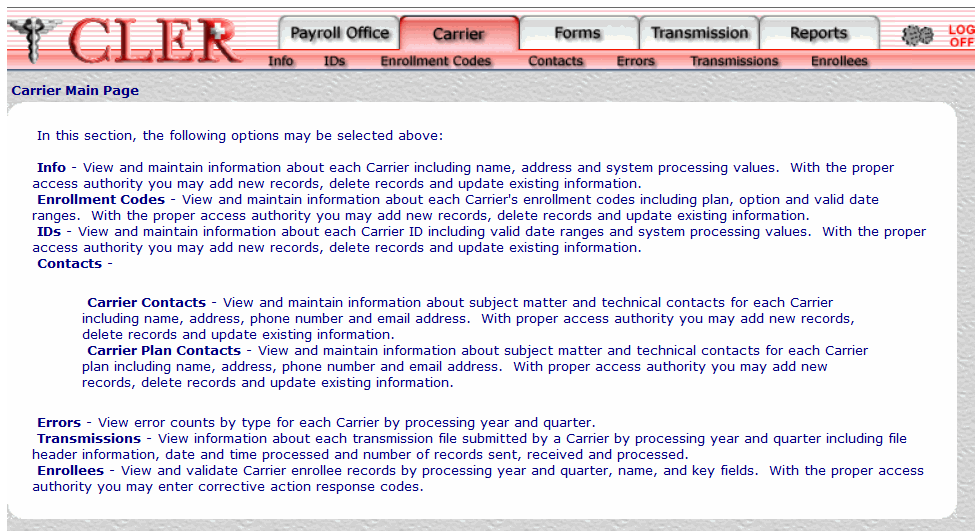


Figure 33: Carrier Main Page



3. Select **Info** at the top of the Carrier Main Page. The Carrier Information page is displayed.

Figure 34: Carrier Information Page

4. Complete the fields on the Carrier Information page and click **Submit**.

OR

Click **Reset** to clear all data entered.

Field	Instruction/Description
Carrier	<i>Optional, alphanumeric, 4 positions</i> Enter your company's carrier code. Only the carrier code for your company should be entered in this field. If the carrier code is not entered, this field defaults to your company's carrier code.
Name	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the name of the carrier.
City	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the name of the carrier's city. <u>Note: If the address is an overseas military address, type FPO for fleet post office or APO for army post office in lieu of the city.</u>
State	<i>Optional, alphanumeric, 2 positions maximum</i> Select the payroll office's, carrier's, carrier contact's, or carrier plan contact's State, U.S. territory, or overseas military abbreviation from the drop-down menu. Refer to the State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260) for a list and descriptions of State, U.S. territory, and overseas military abbreviations.



Order By	<p><i>Optional, default</i></p> <p>Defaults to the Carrier sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values:</p> <p>Carrier - Search by carrier code.</p> <p>Name - Search by name.</p> <p>City - Search by city.</p> <p>State - Search by State.</p>
-----------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

5. The Carrier Information Search Results page is displayed.

Figure 35: Carrier Information Search Results Page

Field	Description
Carrier	<p><i>System generated</i></p> <p>Displays the carrier code.</p>
Name	<p><i>System generated</i></p> <p>Displays the name of the carrier.</p>
Address	<p><i>System generated</i></p> <p>Displays the carrier's street or post office box address.</p>
City	<p><i>System generated</i></p> <p>Displays the name of the carrier's city.</p> <p><u>Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.</u></p>
State	<p><i>System generated</i></p> <p>Displays the carrier's State, U.S. territory, or overseas military abbreviation. For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260).</p>



Zip	<i>System generated</i> Displays the carrier's ZIP Code.
-----	-------------------------------------------------------------

6. Click **View** next to the applicable record. The Carrier Information View page is displayed.

Note: To view another record, click your browser's Back button to return to the Carrier Information Search Results page. Click **View** next to the applicable record.

Figure 36: Carrier Information View Page

Field	Description
Carrier	<i>System generated</i> Displays the carrier code.
Name	<i>System generated</i> Displays the name of the carrier.
Address Line 1	<i>System generated</i> Displays the first line of the carrier's street or post office box address.
Address Line 2	<i>System generated</i> Displays the second line of the carrier's street or post office box address.



Address Line 3	<p><i>System generated</i></p> <p>Displays the third line of the carrier's street or post office box address.</p>
City	<p><i>System generated</i></p> <p>Displays the name of the carrier's city.</p> <hr/> <p>Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.</p> <hr/>
State	<p><i>System generated</i></p> <p>Displays the carrier's State, U.S. territory, or overseas military abbreviation. For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260).</p>
Zip	<p><i>System generated</i></p> <p>Displays the carrier's ZIP Code.</p>
Foreign Country	<p><i>System generated</i></p> <p>Displays the carrier's country code. For a list and descriptions of country codes, see Country Codes Table (on page 262).</p>
Start Date	<p><i>System generated</i></p> <p>Displays the first date (MMDDYYYY) the carrier plan will be valid. If the date is not known, 01/01/2001 is displayed.</p>
End Date	<p><i>System generated</i></p> <p>Displays the last date (MMDDYYYY) the carrier plan will be valid. If the date is not known, 12/31/9999 is displayed.</p>
Last Changed ID	<p><i>System generated</i></p> <p>Displays the user ID number of the individual who made the most recent change to the record.</p>
Last Changed Date	<p><i>System generated</i></p> <p>Displays the date of the most recent change.</p>
Last Changed Time	<p><i>System generated</i></p> <p>Displays the time of the most recent change.</p>

For more information see:

Viewing Carrier ID Records 68



Viewing Carrier Enrollment Code Records 71

Viewing Carrier ID Records

The IDs option on the Carrier Main Page allows users to view information about each carrier ID number. NFC's CLER Operations and Reconciliation Unit personnel assign a number for each carrier transmitting location.

To View a Carrier ID Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

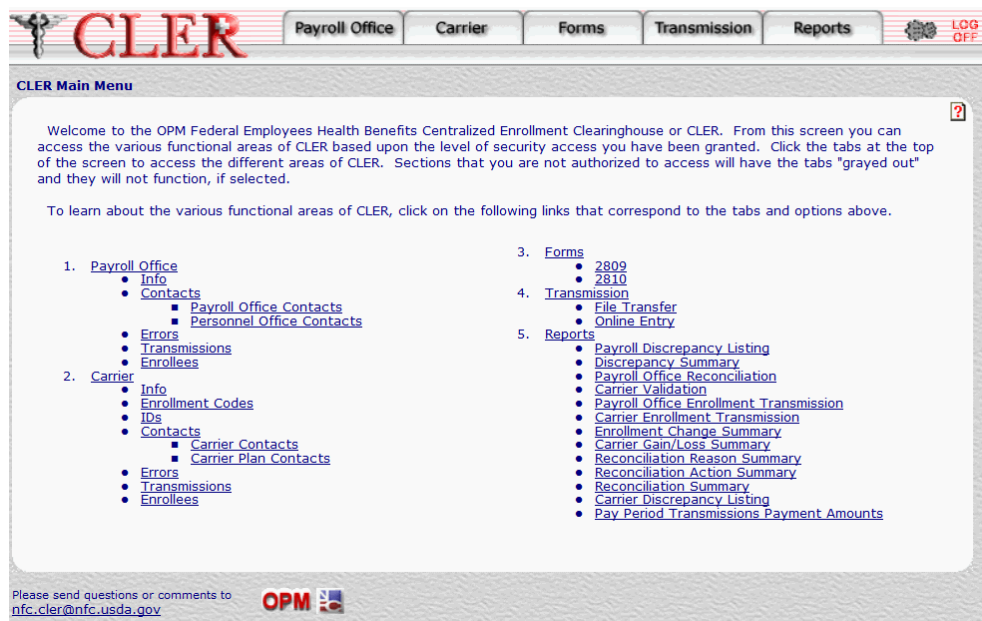


Figure 37: CLER Main Menu Page



- The Carrier Main Page is displayed.

Carrier Main Page

In this section, the following options may be selected above:

Info - View and maintain information about each Carrier including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.

Enrollment Codes - View and maintain information about each Carrier's enrollment codes including plan, option and valid date ranges. With the proper access authority you may add new records, delete records and update existing information.

IDs - View and maintain information about each Carrier ID including valid date ranges and system processing values. With the proper access authority you may add new records, delete records and update existing information.

Contacts -

Carrier Contacts - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

Carrier Plan Contacts - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

Errors - View error counts by type for each Carrier by processing year and quarter.

Transmissions - View information about each transmission file submitted by a Carrier by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.

Enrollees - View and validate Carrier enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter corrective action response codes.

Figure 38: Carrier Main Page

- Select **IDs** at the top of the Carrier Main Page. The Carrier Identifiers page is displayed.

Carrier Identifiers

Click the **Add** button to add a new Carrier Identifiers record. Enter selection criteria in the following fields and click the **SUBMIT** button to search for records based on your entries.

Carrier ID

SUBMIT **RESET**

Figure 39: Carrier Identifiers Page

- Complete the field on the Carrier Identifiers page and click **Submit**.

OR

Click **Reset** to clear all data entered.

Field	Instruction
Carrier ID	<p><i>Required, alphanumeric, 7 positions</i></p> <p>Enter the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.</p>



5. The Carrier Identifiers Search Results page is displayed.

Carrier ID Name Start Date End Date Options

1 01/02/2001 12/31/9999 View

Records Found: 1

Figure 40: Carrier Identifiers Search Results Page

Field	Description
Carrier ID	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Name	<i>System generated</i> Displays the name of the carrier.
Start Date	<i>System generated</i> Displays the first date (MMDDYYYY) the carrier plan will be valid. If the date is not known, 01/01/2001 is displayed.
End Date	<i>System generated</i> Displays the last date (MMDDYYYY) the carrier plan will be valid. If the date is not known, 12/31/9999 is displayed.

6. Click **View** next to the applicable record. The Carrier Identifiers View page is displayed.

Note: To view another record, click your browser's Back button to return to the Carrier Identifiers Search Results page. Click **View** next to the applicable record.

Use the browser Back arrow to select another record to view.

Carrier ID

Start Date End Date

01 02 2001 12 31 9999

Error Threshold Threshold Type (percent or number) P

Last Changed: ID Date Time

 01 18 2002 14:15:53

Figure 41: Carrier Identifiers View Page



Field	Description
Carrier ID	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Start Date	<i>System generated</i> Displays the first date (MMDDYYYY) the carrier plan will be valid. If the date is not known, 01/01/2001 is displayed.
End Date	<i>System generated</i> Displays the last date (MMDDYYYY) the carrier plan will be valid. If the date is not known, 12/31/9999 is displayed.
Error Threshold	<i>System generated</i> Displays the number of percentage of errors permitted for the payroll office/carrier before a transmission file is rejected.
Threshold Type	<i>System generated</i> Displays the number measure of the error threshold. P represents percent and N represents number.
Last Changed ID	<i>System generated</i> Displays the user ID number of the individual who made the most recent change to the record.
Last Changed Date	<i>System generated</i> Displays the date of the most recent change.
Last Changed Time	<i>System generated</i> Displays the time of the most recent change.

Viewing Carrier Enrollment Code Records

The Enrollment Codes option on the Carrier Main Page allows users to view information about each carrier's enrollment codes. This information includes plan, option, and valid date ranges.



To View a Carrier Enrollment Code Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

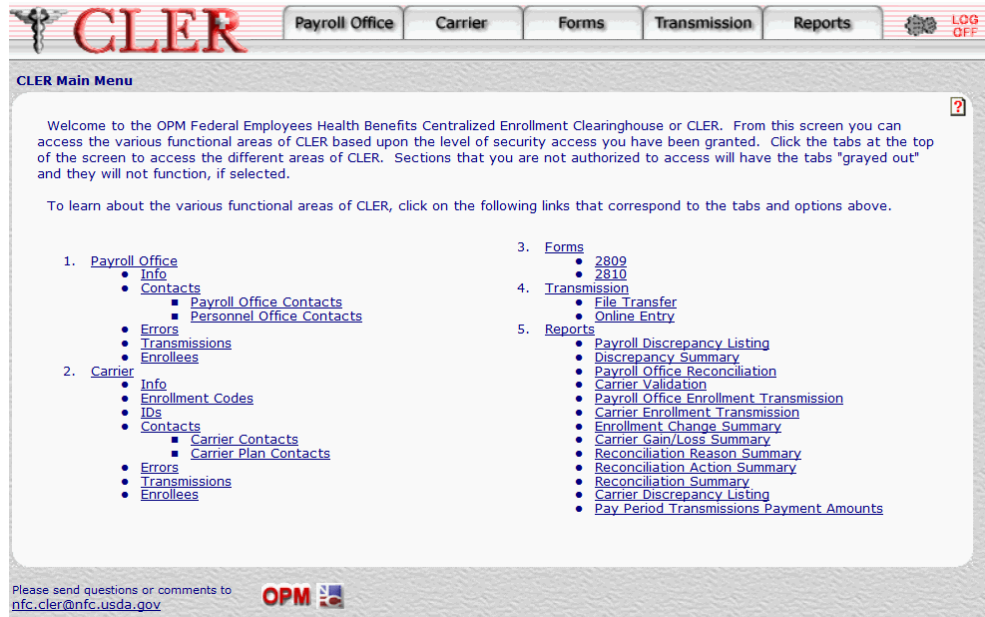


Figure 42: CLER Main Menu Page

2. The Carrier Main Page is displayed.

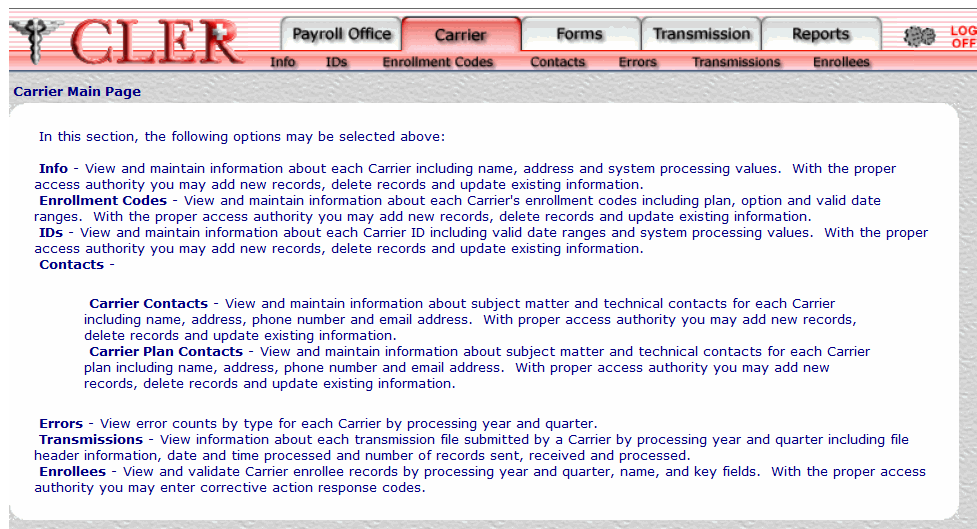


Figure 43: Carrier Main Page



3. Select **Enrollment Codes** at the top of the Carrier Main Page. The Carrier Enrollment Codes page is displayed.

Figure 44: Carrier Enrollment Codes Pages

4. Complete the fields on the Carrier Enrollment Codes page and click **Submit**.

OR

Click **Reset** to clear all data entered.

Field	Instruction/Description
Carrier	<i>Optional, alphanumeric, 4 positions</i> Enter your company's carrier code. Only the carrier code for your company should be entered in this field. If the carrier code is not entered, this field defaults to your company's carrier code.
Enrollment Code	<i>Optional, alphanumeric, 3 positions</i> Enter the enrollment/carrier enrollment code.
Order By	<i>Optional, default</i> Defaults to the Carrier sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values: Carrier - Search by carrier code. Code - Search by carrier enrollment code.



5. The Carrier Enrollment Codes Search Results page is displayed.

Figure 45: Carrier Enrollment Codes Search Results Page

Field	Description
Carrier	<i>System generated</i> Displays the carrier code.
Region	<i>System generated</i> Displays the carrier's enrollment data transmission location code assigned by NFC's CLER Operations and Reconciliation Unit.
Code	<i>System generated</i> Displays the enrollment code.
Name	<i>System generated</i> Displays the name of the carrier.
Start Date	<i>System generated</i> Displays the first date the carrier enrollment code will be valid.
End Date	<i>System generated</i> Displays the the last date the carrier enrollment code will be valid.

6. Click **View** next to the applicable record. The Carrier Identifiers View page is displayed.



Note: To view another record, click your browser's Back button to return to the Carrier Identifiers Search Results page. Click **View** next to the applicable record.

Figure 46: Viewing Carrier Identifiers View Page

Field	Description
Carrier ID	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Start Date	<i>System generated</i> Displays the first date (MMDDYYYY) the carrier plan will be valid. If the date is not known, 01/01/2001 is displayed.
End Date	<i>System generated</i> Displays the last date (MMDDYYYY) the carrier plan will be valid. If the date is not known, 12/31/9999 is displayed.
Error Threshold	<i>System generated</i> Displays the number of percentage of errors permitted for the payroll office/carrier before a transmission file is rejected.
Threshold Type	<i>System generated</i> Displays the number measure of the error threshold. P represents percent and N represents number.
Last Changed ID	<i>System generated</i> Displays the user ID number of the individual who made the most recent change to the record.
Last Changed Date	<i>System generated</i> Displays the date of the most recent change.



Last Changed Time	<i>System generated</i> Displays the time of the most recent change.
--------------------------	-------------------------------------------------------------------------



Maintaining Carrier and Carrier Plan Contact Records

The Contacts option on the Carrier Main Page allows users to view and maintain information about subject matter and technical contacts for each carrier. With proper access authority, new records may be added and current records may be updated.

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Adding a Carrier Contact Record

The Add function allows users to add carrier contact records.



To Add a Carrier Contact Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

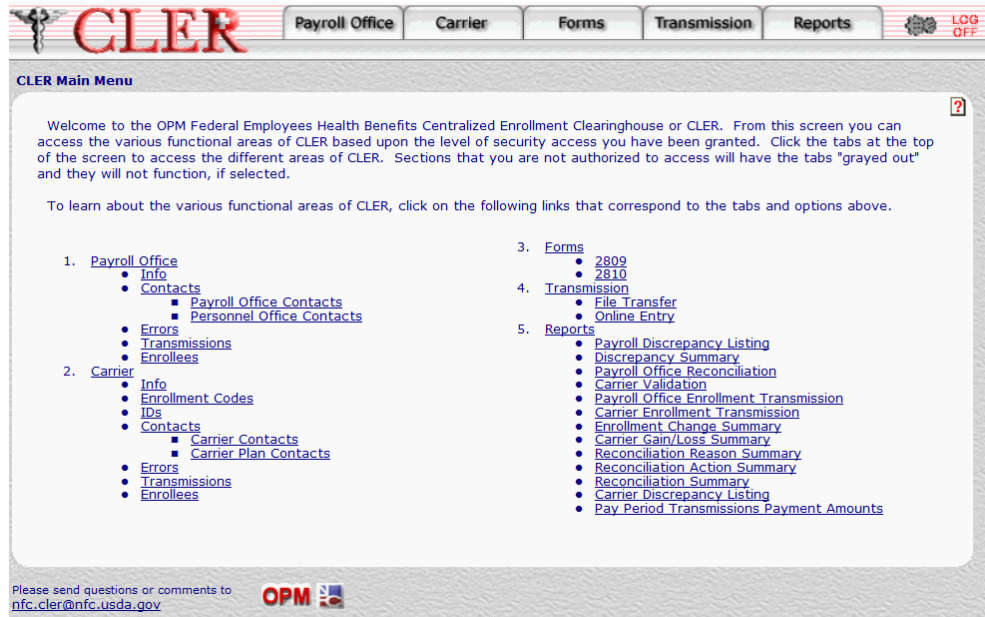


Figure 47: CLER Main Menu Page

2. The Carrier Main Page is displayed.

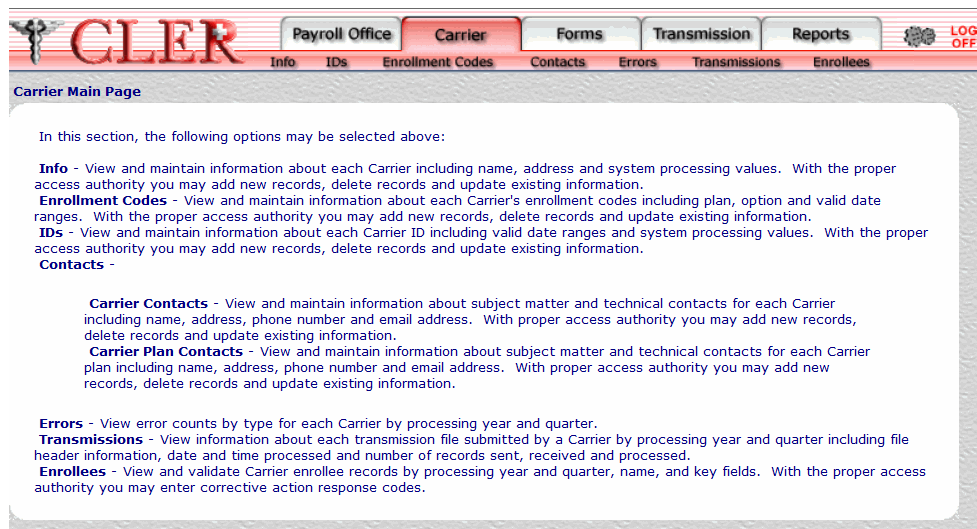


Figure 48: Carrier Main Page



3. Select **Contacts** at the top of the Carrier Main Page. The Contacts Main Page is displayed with the Carrier Contacts and Carrier Plan Contacts options.

The screenshot shows the CLER web application interface. At the top, there is a navigation bar with tabs for Payroll Office, Carrier, Forms, Transmission, and Reports. Below this is a sub-navigation bar with links for Info, IDs, Enrollment Codes, Contacts, Errors, Transmissions, and Enrollees. The main content area is titled "Contacts Main Page" and contains the following text:

Select from the following tables to view or update.

- Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address.
- Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address.

Figure 49: Contacts Main Page

4. Click the **Carrier Contacts** link to display the Carrier Contacts page.

The screenshot shows the CLER web application interface for the Carrier Contacts page. At the top, there is a navigation bar with tabs for Payroll Office, Carrier, Forms, Transmission, and Reports. Below this is a sub-navigation bar with links for Info, IDs, Enrollment Codes, Contacts, Errors, Transmissions, and Enrollees. The main content area is titled "Carrier Contacts" and contains the following text:

Click the **Add** button to add a new Carrier Contacts record. Enter selection criteria in the following fields and click the SUBMIT button to search for records based on your entries.

Carrier ID Type

Display: All ☒ Active ☐ Inactive ☐

Order By: ID ☒ Type ☐

SUBMIT **RESET**

Figure 50: Carrier Contacts Page



5. Click **Add** on the Carrier Contacts page to display the Carrier Contacts Add page.

Figure 51: Carrier Contacts Add Page

6. Complete the fields on the Carrier Contacts Add page.

Field	Instruction/Description
Carrier ID*	<i>Required</i> Select the carrier ID number from the drop-down menu.
Type*	<i>Required</i> Select either General for an administrative contact or Technical for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Role	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the title, position, etc., of the carrier contact/carrier plan contact.
Name	<i>Optional, alphanumeric, 30 positions maximum</i> Enter the name of the carrier contact.



Field	Instruction/Description
Address Line 1	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the first line of the carrier contact's street or post office box address.
Address Line 2	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the second line of the carrier contact's street or post office box address.
Address Line 3	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the third line of the carrier contact's street or post office box address.
City	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the name of the carrier contact's city.
State	<i>Optional, alphanumeric, 2 positions maximum</i> Select the payroll office's, carrier's, carrier contact's, or carrier plan contact's State, U.S. territory, or overseas military abbreviation from the drop-down menu. Refer to the State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260) for a list and descriptions of State, U.S. territory, and overseas military abbreviations.
Zip	<i>Optional, alphanumeric, 11 positions maximum</i> Enter the carrier contact's ZIP Code.
Foreign Country	<i>Optional</i> Select the carrier contact's country code from the drop-down menu. For a list and descriptions of country codes, see Country Codes Table (on page 262).
Phone Number	<i>Optional, alphanumeric, 25 positions</i> Enter the carrier contact's telephone number.
Fax Number	<i>Optional, alphanumeric, 25 positions</i> Enter the carrier contact's fax number.
Email Address	<i>Optional, alphanumeric, 60 positions</i> Enter the carrier contact's email address.
Remarks	<i>Optional, alphanumeric, 80 positions</i> Enter remarks about this record.

- Click **Add Record**. If no errors occur, a pop-up message is displayed to confirm the record has been added.



8. Click **OK** to close the pop-up.

Note: To add another record, click **Cancel** to refresh the Carrier Contacts Add page and complete the fields for the new record.

Adding a Carrier Plan Contact Record

The Add function allows users to add carrier plan contact records.

To Add a Carrier Plan Contact Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

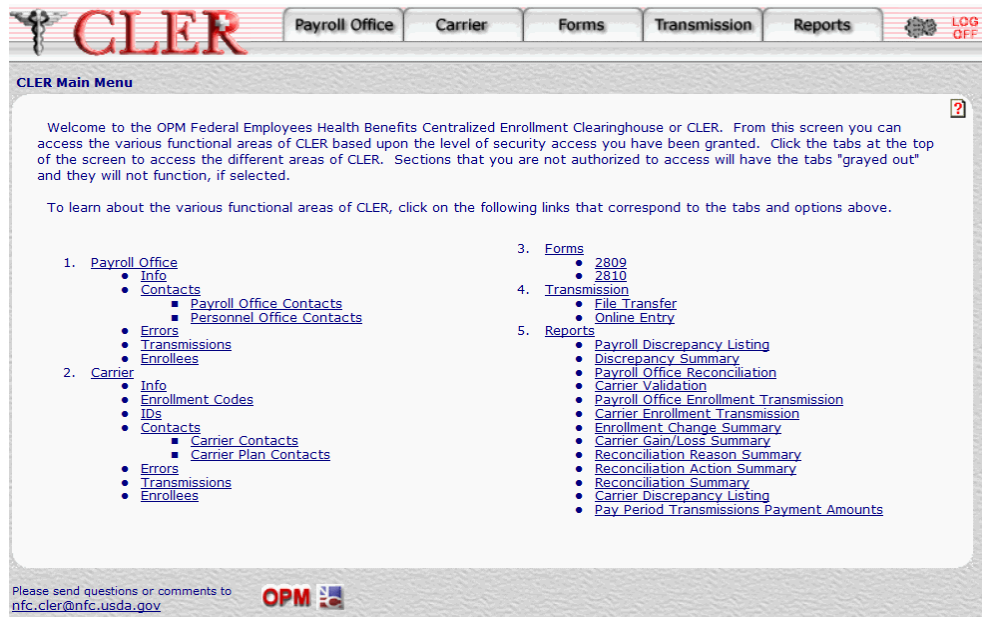


Figure 52: CLER Main Menu Page



2. The Carrier Main Page is displayed.

The Carrier Main Page features a top navigation bar with tabs: Payroll Office, Carrier (selected), Forms, Transmission, and Reports. Below this is a sub-navigation bar with links: Info, IDs, Enrollment Codes, Contacts, Errors, Transmissions, and Enrollees. The main content area is titled "Carrier Main Page" and contains a list of options with descriptions:

- Info** - View and maintain information about each Carrier including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.
- Enrollment Codes** - View and maintain information about each Carrier's enrollment codes including plan, option and valid date ranges. With the proper access authority you may add new records, delete records and update existing information.
- IDs** - View and maintain information about each Carrier ID including valid date ranges and system processing values. With the proper access authority you may add new records, delete records and update existing information.
- Contacts** -
 - Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.
 - Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.
- Errors** - View error counts by type for each Carrier by processing year and quarter.
- Transmissions** - View information about each transmission file submitted by a Carrier by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.
- Enrollees** - View and validate Carrier enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter corrective action response codes.

Figure 53: Carrier Main Page

3. Select **Contacts** at the top of the Carrier Main Page. The Contacts Main Page is displayed with the Carrier Contacts and Carrier Plan Contacts options.

The Contacts Main Page features a top navigation bar with tabs: Payroll Office, Carrier (selected), Forms, Transmission, and Reports. Below this is a sub-navigation bar with links: Info, IDs, Enrollment Codes, Contacts (selected), Errors, Transmissions, and Enrollees. The main content area is titled "Contacts Main Page" and contains a list of options with descriptions:

- Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address.
- Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address.

Figure 54: Contacts Main Page

4. Click the **Carrier Plan Contacts** link to display the Carrier Plan Contacts page.

The Carrier Plan Contacts page features a top navigation bar with tabs: Payroll Office, Carrier (selected), Forms, Transmission, and Reports. Below this is a sub-navigation bar with links: Info, IDs, Enrollment Codes, Contacts (selected), Errors, Transmissions, and Enrollees. The main content area is titled "Carrier Plan Contacts" and contains a form with the following fields and buttons:

- Click the **Add** button to add a new Carrier Plan Contacts record. Enter selection criteria in the following fields and click the **SUBMIT** button to search for records based on your entries.
- Carrier** (text input field)
- Plan** (text input field)
- Type** (dropdown menu)
- Display:** ☒ All ☐ Active ☐ Inactive
- Order By:** ☒ Carrier ☐ Plan ☐ Type
- SUBMIT** (button)
- RESET** (button)

Figure 55: Carrier Plan Contacts Page



5. Click **Add** on the Carrier Plan Contacts page to display the Carrier Plan Contacts Add page.

Figure 56: Carrier Plan Contacts Add Page

6. Complete the fields on the Carrier Plan Contacts Add page.

Field	Instruction/Description
Carrier*	<i>Required</i> Select the carrier code from the drop-down menu.
Plan*	<i>Required, alphanumeric, 2 positions</i> Enter the first two positions of the carrier enrollment code.
Type*	<i>Required</i> Select either General for an administrative contact or Technical for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Role	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the title, position, etc., of the carrier contact/carrier plan contact.



Name	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the name of the carrier plan contact.
Address Line 1	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the first line of the carrier contact's street or post office box address.
Address Line 2	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the second line of the carrier contact's street or post office box address.
Address Line 3	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the third line of the carrier contact's street or post office box address.
City	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the name of the carrier plan contact's city.
State	<i>Optional, alphanumeric, 2 positions maximum</i> Select the payroll office's, carrier's, carrier contact's, or carrier plan contact's State, U.S. territory, or overseas military abbreviation from the drop-down menu. Refer to the State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260) for a list and descriptions of State, U.S. territory, and overseas military abbreviations.
Zip	<i>System generated</i> Displays the carrier plan contact's ZIP Code.
Foreign Country	<i>Optional</i> Select the carrier plan contact's country code from the drop-down menu. For a list and descriptions of country codes, see Country Codes Table (on page 262).
Phone Number	<i>Optional, alphanumeric, 25 positions</i> Enter the carrier plan contact's telephone number.
Fax Number	<i>Optional, alphanumeric, 25 positions</i> Enter the carrier plan contact's fax number.
Email Address	<i>Optional, alphanumeric, 60 positions</i> Enter the carrier plan contact's email address.
Remarks	<i>Optional, alphanumeric, 80 positions</i> Enter remarks about this record.



7. Click **Add Record**. If no errors occur, a pop-up message is displayed to confirm the record has been added.
8. Click **OK** to close the pop-up.

Note: To add another record, click **Cancel** to refresh the Carrier Plan Contacts Add page and complete the fields for the new record.

Viewing a Carrier Contact Record

The View function allows users to view carrier contact records.

To View a Carrier Contact Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

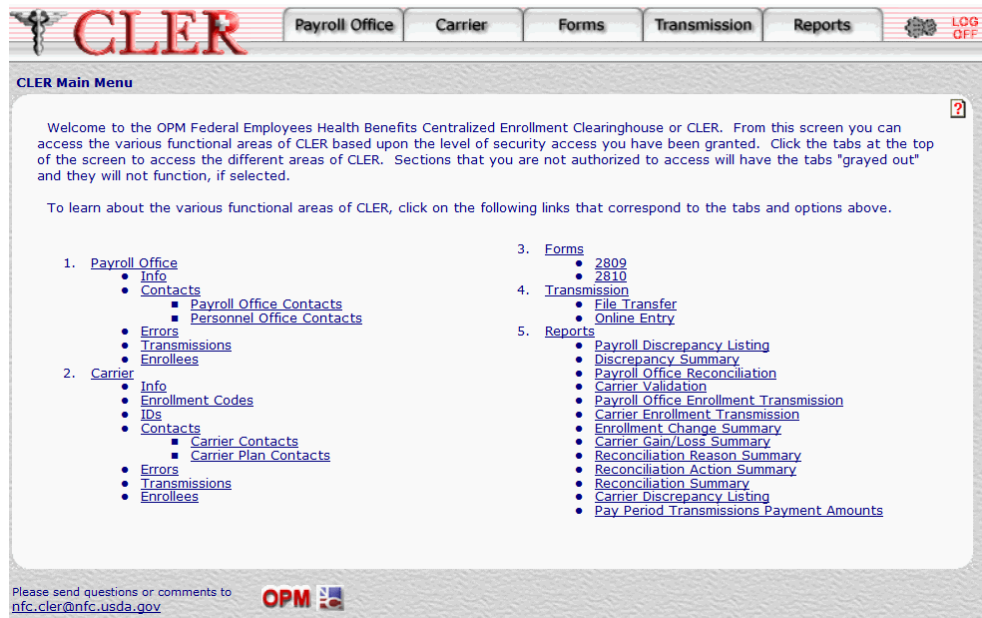


Figure 57: CLER Main Menu Page



2. The Carrier Main Page is displayed.

Carrier Main Page

In this section, the following options may be selected above:

- Info** - View and maintain information about each Carrier including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.
- Enrollment Codes** - View and maintain information about each Carrier's enrollment codes including plan, option and valid date ranges. With the proper access authority you may add new records, delete records and update existing information.
- IDs** - View and maintain information about each Carrier ID including valid date ranges and system processing values. With the proper access authority you may add new records, delete records and update existing information.
- Contacts** -
 - Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.
 - Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.
- Errors** - View error counts by type for each Carrier by processing year and quarter.
- Transmissions** - View information about each transmission file submitted by a Carrier by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.
- Enrollees** - View and validate Carrier enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter corrective action response codes.

Figure 58: Carrier Main Page

3. Select **Contacts** at the top of the Carrier Main Page. The Contacts Main Page is displayed with the Carrier Contacts and Carrier Plan Contacts options.

Contacts Main Page

Select from the following tables to view or update.

- Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address.
- Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address.

Figure 59: Contacts Main Page

4. Click the **Carrier Contacts** link to display the Carrier Contacts page.

Carrier Contacts

Click the **Add** button to add a new Carrier Contacts record. Enter selection criteria in the following fields and click the SUBMIT button to search for records based on your entries.

Carrier ID: Type:

Display: ☒ All ☐ Active ☐ Inactive

Order By: ☒ ID ☐ Type

SUBMIT **RESET**

Figure 60: Carrier Contacts Page

5. Complete the fields on the Carrier Contacts page and click **Submit**.



OR

Click **Reset** to clear all data entered.

Field	Instruction/Description
Carrier ID	<i>Required, alphanumeric, 7 positions</i> Enter the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Type	<i>Optional</i> Select either General for an administrative contact or Technical for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Display	<i>Optional, default</i> Defaults to All display option. Allows users to display search results by the options listed below. To choose a display option, select the radio button next to one of the following values: All - Displays all contacts for the payroll office ID and type code entered. Active - Displays active contacts for the payroll office ID and type code entered. Inactive - Displays inactive contacts for the payroll office ID and type code entered.
Order By	<i>Optional, default</i> Defaults to the ID sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values: ID - Search by ID number. Type - Search by type code.

6. The Carrier Contacts Search Results page is displayed.

Carrier ID	Type	Status	Name	Phone	Email	Options
	General	Inactive				View Activate Update
	General	Inactive				View Activate Update
	General	Inactive				View Activate Update
	General	Inactive				View Activate Update

Figure 61: Carrier Contacts Search Results Page



Field	Description
Carrier ID	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Type	<i>System generated</i> Displays General type code to indicate that the payroll office contact holds an administrative position. Displays Technical type code to indicate that the payroll office contact holds a technical position.
Status	<i>System generated</i> Displays active to indicate that the record has been activated in CLER. Displays inactive to indicate that the record has been inactivated in CLER.
Name	<i>System generated</i> Displays the name of the carrier contact.
Phone	<i>System generated</i> Displays the carrier contact's telephone number.
Email	<i>System generated</i> Displays the carrier contact's email address.

7. Click **View** next to the applicable record. The Carrier Contacts View page is displayed.



Note: To view another record, click your browser's Back button to return to the Carrier Contacts Search Results page. Click **View** next to the applicable record.

CLER Payroll Office Carrier Forms Transmission Reports LOG OFF

Info IDs Enrollment Codes Contacts Errors Transmissions Enrollees

Carrier Contacts View

Use the browser Back arrow to select another record to view.

BLUE CROSS AND BLUE SHIELD

Carrier ID Type

Role

Name

Address

City State Zip Foreign Country

Phone Number Fax Number

Email Address

Remarks

Last Changed: ID Date Time

Figure 62: Carrier Contacts View Page

Field	Description
Carrier ID	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Type	<i>System generated</i> Displays General type code to indicate that the payroll office contact holds an administrative position. Displays Technical type code to indicate that the payroll office contact holds a technical position.
Role	<i>System generated</i> Displays the title, position, etc., of the payroll office contact/personnel office contact/carrier contact/carrier plan contact.
Name	<i>System generated</i> Displays the name of the carrier contact.



Address Line 1	<p><i>System generated</i></p> <p>Displays the first line of the carrier contact's street or post office box address.</p>
Address Line 2	<p><i>System generated</i></p> <p>Displays the second line of the carrier contact's street or post office box address.</p>
Address Line 3	<p><i>System generated</i></p> <p>Displays the third line of the carrier contact's street or post office box address.</p>
City	<p><i>System generated</i></p> <p>Displays the name of the carrier contact's city.</p> <hr/> <p>Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.</p> <hr/>
State	<p><i>System generated</i></p> <p>Displays the carrier contact's State, U.S. territory, or overseas military abbreviation. For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260).</p>
Zip	<p><i>System generated</i></p> <p>Displays the carrier contact's ZIP Code.</p>
Foreign Country	<p><i>System generated</i></p> <p>Displays the carrier contact's country code. For a list and descriptions of country codes, see Country Codes Table (on page 262).</p>
Phone Number	<p><i>System Generated</i></p> <p>Displays the carrier contact's telephone number.</p>
Fax Number	<p><i>System generated</i></p> <p>Displays the carrier contact's fax number.</p>
Email Address	<p><i>System generated</i></p> <p>Displays the carrier contact's email address.</p>
Remarks	<p><i>System generated</i></p> <p>Displays the remarks about this record.</p>



Last Carrier Update ID	<i>System generated</i> Displays the user ID number of the carrier representative/individual who made the most recent change to the record.
Last Carrier Update Date	<i>System generated</i> Displays the date of the most recent change.
Last Carrier Update Time	<i>System generated</i> Displays the the time of the most recent change.

Viewing a Carrier Plan Contact Record

The View function allows users to view carrier plan contact records.

To View a Carrier Plan Contact Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

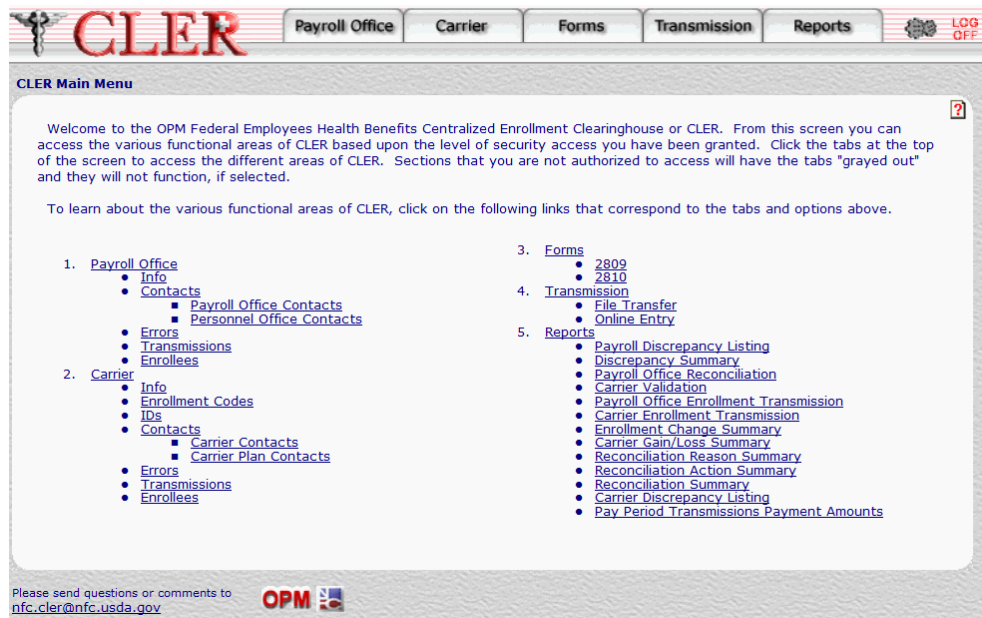


Figure 63: CLER Main Menu Page



2. The Carrier Main Page is displayed.

Carrier Main Page

In this section, the following options may be selected above:

- Info** - View and maintain information about each Carrier including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.
- Enrollment Codes** - View and maintain information about each Carrier's enrollment codes including plan, option and valid date ranges. With the proper access authority you may add new records, delete records and update existing information.
- IDs** - View and maintain information about each Carrier ID including valid date ranges and system processing values. With the proper access authority you may add new records, delete records and update existing information.
- Contacts** -
 - Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.
 - Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.
- Errors** - View error counts by type for each Carrier by processing year and quarter.
- Transmissions** - View information about each transmission file submitted by a Carrier by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.
- Enrollees** - View and validate Carrier enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter corrective action response codes.

Figure 64: Carrier Main Page

3. Select **Contacts** at the top of the Carrier Main Page. The Contacts Main Page is displayed with the Carrier Contacts and Carrier Plan Contacts options.

Contacts Main Page

Select from the following tables to view or update.

- Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address.
- Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address.

Figure 65: Contacts Main Page

4. Click the **Carrier Plan Contacts** link to display the Carrier Plan Contacts page.

Carrier Plan Contacts

Click the **Add** button to add a new Carrier Plan Contacts record. Enter selection criteria in the following fields and click the **SUBMIT** button to search for records based on your entries.

Carrier: Plan: Type:

Display: All ☒ Active ☐ Inactive ☐

Order By: Carrier ☒ Plan ☐ Type ☐

SUBMIT **RESET**

Figure 66: Carrier Plan Contacts Page

5. Complete the fields on the Carrier Plan Contacts page and click **Submit**.



OR

Click **Reset** to clear all data entered.

Field	Instruction/Description
Carrier	<i>Optional, alphanumeric, 7 positions</i> Enter the carrier ID code.
Plan	<i>Optional, alphanumeric, 2 positions</i> Enter the first two positions of the carrier enrollment code.
Type	<i>Optional</i> Select either General for an administrative contact or Technical for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Display	<i>Optional, default</i> Defaults to All display option. Allows users to display search results by the options listed below. To choose a display option, select the radio button next to one of the following values: All - Displays all contacts for the payroll office ID and type code entered. Active - Displays active contacts for the payroll office ID and type code entered. Inactive - Displays inactive contacts for the payroll office ID and type code entered.
Order By	<i>Optional, default</i> Defaults to the Carrier sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values: Carrier - Search by carrier code. Plan - Search by plan code. Type - Search by type code.



6. The Carrier Plan Contacts Search Results page is displayed.

Figure 67: Carrier Plan Contacts Search Results Page

Field	Description
Carrier	<i>System generated</i> Displays the carrier ID code.
Plan	<i>System generated</i> Displays the first two positions of the carrier enrollment code.
Type	<i>System generated</i> Displays General type code to indicate that the payroll office contact holds an administrative position. Displays Technical type code to indicate that the payroll office contact holds a technical position.
Status	<i>System generated</i> Displays active to indicate that the record has been activated in CLER. Displays inactive to indicate that the record has been inactivated in CLER.
Name	<i>System generated</i> Displays the name of the carrier plan contact.
Phone	<i>System generated</i> Displays the carrier plan contact's telephone number.
Email	<i>System generated</i> Displays the carrier plan contact's email address.

7. Click **View** next to the applicable record. The Carrier Plan Contacts View page is displayed.



Note: To view another record, click your browser's Back button to return to the Carrier Plan Contacts Search Results page. Click **View** next to the applicable record.

Figure 68: Carrier Plan Contacts View Page

Field	Description
Carrier	<i>System generated</i> Displays the carrier code.
Plan	<i>System generated</i> Displays the first two positions of the carrier enrollment code.
Type	<i>System generated</i> Displays General type code to indicate that the payroll office contact holds an administrative position. Displays Technical type code to indicate that the payroll office contact holds a technical position.
Role	<i>System generated</i> Displays the title, position, etc., of the payroll office contact/personnel office contact/carrier contact/carrier plan contact.



Name	<p><i>System generated</i></p> <p>Displays the name of the carrier plan contact.</p>
Address Line 1	<p><i>System generated</i></p> <p>Displays the first line of the carrier plan contact's street or post office box address.</p>
Address Line 2	<p><i>System generated</i></p> <p>Displays the second line of the carrier plan contact's street or post office box address.</p>
Address Line 3	<p><i>System generated</i></p> <p>Displays the third line of the carrier plan contact's street or post office box address.</p>
City	<p><i>System generated</i></p> <p>Displays the name of the carrier plan contact's city.</p> <hr/> <p>Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.</p> <hr/>
State	<p><i>System generated</i></p> <p>Displays the carrier plan contact's State, U.S. territory, or overseas military abbreviation. For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260).</p>
Zip	<p><i>System generated</i></p> <p>Displays the carrier plan contact's ZIP Code.</p>
Foreign Country	<p><i>System generated</i></p> <p>Displays the carrier plan contact's country code. For a list and descriptions of country codes, see Country Codes Table (on page 262).</p>
Phone Number	<p><i>System Generated</i></p> <p>Displays the carrier plan contact's telephone number.</p>
Fax Number	<p><i>System generated</i></p> <p>Displays the carrier plan contact's fax number.</p>
Email Address	<p><i>System generated</i></p> <p>Displays the carrier plan contact's email address.</p>



Remarks	<i>System generated</i> Displays the remarks about this record.
Last Changed ID	<i>System generated</i> Displays the user ID number of the individual who made the most recent change to the record.
Last Changed Date	<i>System generated</i> Displays the date of the most recent change.
Last Changed Time	<i>System generated</i> Displays the time of the most recent change.

Activating or Inactivating a Carrier Contact Record

The Activate/Inactivate function allows users to activate and inactivate carrier contact records.

To Activate or Inactivate a Carrier Contact Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

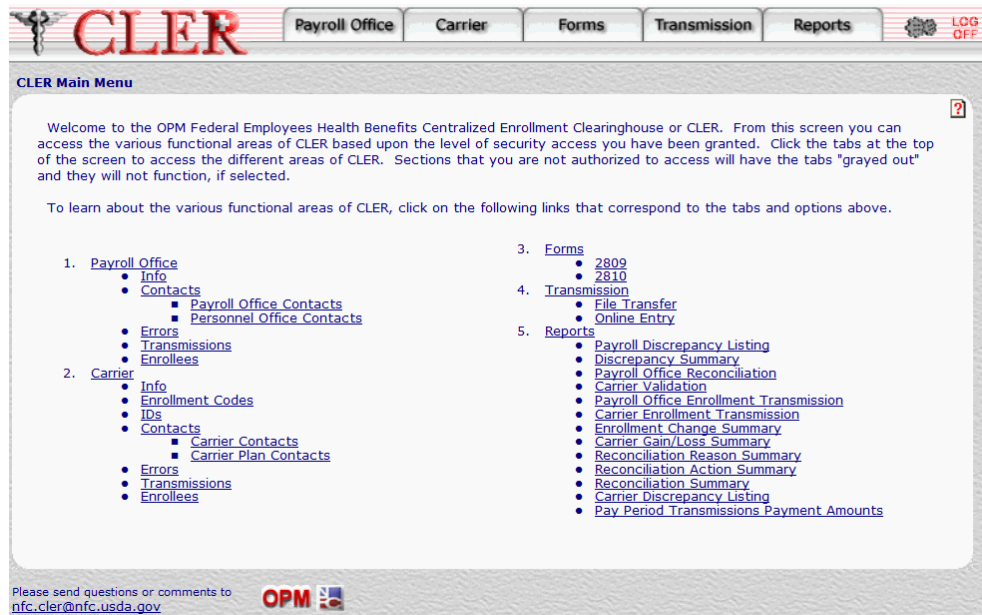


Figure 69: CLER Main Menu Page



2. The Carrier Main Page is displayed.

Carrier Main Page

In this section, the following options may be selected above:

- Info** - View and maintain information about each Carrier including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.
- Enrollment Codes** - View and maintain information about each Carrier's enrollment codes including plan, option and valid date ranges. With the proper access authority you may add new records, delete records and update existing information.
- IDs** - View and maintain information about each Carrier ID including valid date ranges and system processing values. With the proper access authority you may add new records, delete records and update existing information.
- Contacts** -
 - Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.
 - Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.
- Errors** - View error counts by type for each Carrier by processing year and quarter.
- Transmissions** - View information about each transmission file submitted by a Carrier by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.
- Enrollees** - View and validate Carrier enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter corrective action response codes.

Figure 70: Carrier Main Page

3. Select **Contacts** at the top of the Carrier Main Page. The Contacts Main Page is displayed with the Carrier Contacts and Carrier Plan Contacts options.

Contacts Main Page

Select from the following tables to view or update.

- Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address.
- Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address.

Figure 71: Contacts Main Page

4. Click the **Carrier Contacts** link to display the Carrier Contacts page.

Carrier Contacts

Click the **Add** button to add a new Carrier Contacts record. Enter selection criteria in the following fields and click the SUBMIT button to search for records based on your entries.

Carrier ID: Type:

Display: All ☒ Active ☐ Inactive ☐

Order By: ID ☒ Type ☐

SUBMIT **RESET**

Figure 72: Carrier Contacts Page

5. Complete the fields on the Carrier Contacts page and click **Submit**.



OR

Click **Reset** to clear all data entered.

Field	Instruction/Description
Carrier ID	<i>Required, alphanumeric, 7 positions</i> Enter the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Type	<i>Optional</i> Select either General for an administrative contact or Technical for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Display	<i>Optional, default</i> Defaults to All display option. Allows users to display search results by the options listed below. To choose a display option, select the radio button next to one of the following values: All - Displays all contacts for the payroll office ID and type code entered. Active - Displays active contacts for the payroll office ID and type code entered. Inactive - Displays inactive contacts for the payroll office ID and type code entered.
Order By	<i>Optional, default</i> Defaults to the ID sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values: ID - Search by ID number. Type - Search by type code.

6. The Carrier Contacts Search Results page is displayed.



Note: The Inactivate button is displayed next to records that have been activated, and the Activate button is displayed next to records that have been inactivated.

Figure 73: Carrier Contacts Search Results Page

Field	Instruction/Description
Carrier ID	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Type	<i>System generated</i> Displays General type code to indicate that the payroll office contact holds an administrative position. Displays Technical type code to indicate that the payroll office contact holds a technical position.
Status	<i>System generated</i> Displays active to indicate that the record has been activated in CLER. Displays inactive to indicate that the record has been inactivated in CLER.
Name	<i>Optional, alphanumeric, 30 positions maximum</i> Enter the name of the carrier contact.
Phone	<i>System generated</i> Displays the carrier contact's telephone number.
Email	<i>Optional, alphanumeric, 60 positions</i> Enter the carrier contact's email address.

- Click **Activate** to activate an inactivated record. A pop-up message is displayed to confirm the record has been activated.
- Click **OK** to close the pop-up.



9. Click **Inactivate** to inactivate an activated record. A pop-up message is displayed to confirm the record has been inactivated.
10. Click **OK** to close the pop-up.

Activating or Inactivating a Carrier Plan Contact Record

The Activate/Inactivate function allows users to activate and inactivate carrier plan contact records.

To Activate or Inactivate a Carrier Plan Contact Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

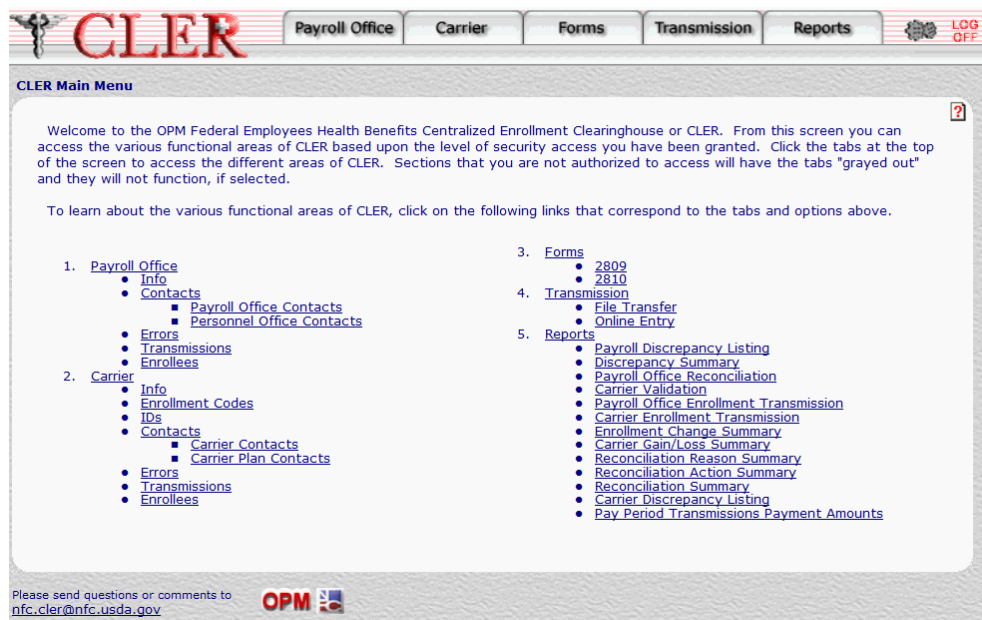


Figure 74: CLER Main Menu Page



2. The Carrier Main Page is displayed.

Carrier Main Page

In this section, the following options may be selected above:

- Info** - View and maintain information about each Carrier including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.
- Enrollment Codes** - View and maintain information about each Carrier's enrollment codes including plan, option and valid date ranges. With the proper access authority you may add new records, delete records and update existing information.
- IDs** - View and maintain information about each Carrier ID including valid date ranges and system processing values. With the proper access authority you may add new records, delete records and update existing information.
- Contacts** -
 - Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.
 - Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.
- Errors** - View error counts by type for each Carrier by processing year and quarter.
- Transmissions** - View information about each transmission file submitted by a Carrier by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.
- Enrollees** - View and validate Carrier enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter corrective action response codes.

Figure 75: Carrier Main Page

3. Select **Contacts** at the top of the Carrier Main Page. The Contacts Main Page is displayed with the Carrier Contacts and Carrier Plan Contacts options.

Contacts Main Page

Select from the following tables to view or update.

- Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address.
- Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address.

Figure 76: Contacts Main Page

4. Click the **Carrier Plan Contacts** link to display the Carrier Plan Contacts page.

Carrier Plan Contacts

Click the **Add** button to add a new Carrier Plan Contacts record. Enter selection criteria in the following fields and click the **SUBMIT** button to search for records based on your entries.

Carrier Plan Type

Display: All ☒ Active ☐ Inactive ☐

Order By: Carrier ☒ Plan ☐ Type ☐

SUBMIT **RESET**

Figure 77: Carrier Plan Contacts Page

5. Complete the fields on the Carrier Plan Contacts page and click **Submit**.



OR

Click **Reset** to clear all data entered.

Field	Instruction/Description
Carrier	<i>Optional, alphanumeric, 7 positions</i> Enter the carrier ID code.
Plan	<i>Required, alphanumeric, 2 positions</i> Enter the first two positions of the carrier enrollment code.
Type	<i>Optional</i> Select either General for an administrative contact or Technical for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Display	<i>Optional, default</i> Defaults to All display option. Allows users to display search results by the options listed below. To choose a display option, select the radio button next to one of the following values: All - Displays all contacts for the payroll office ID and type code entered. Active - Displays active contacts for the payroll office ID and type code entered. Inactive - Displays inactive contacts for the payroll office ID and type code entered.
Order By	<i>Optional, default</i> Defaults to the Carrier sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values: Carrier - Search by carrier code. Plan - Search by plan code. Type - Search by type code.

6. The Carrier Plan Contacts Search Results page is displayed.



Note: The Inactivate button is displayed next to records that have been activated, and the Activate button is displayed next to records that have been inactivated.

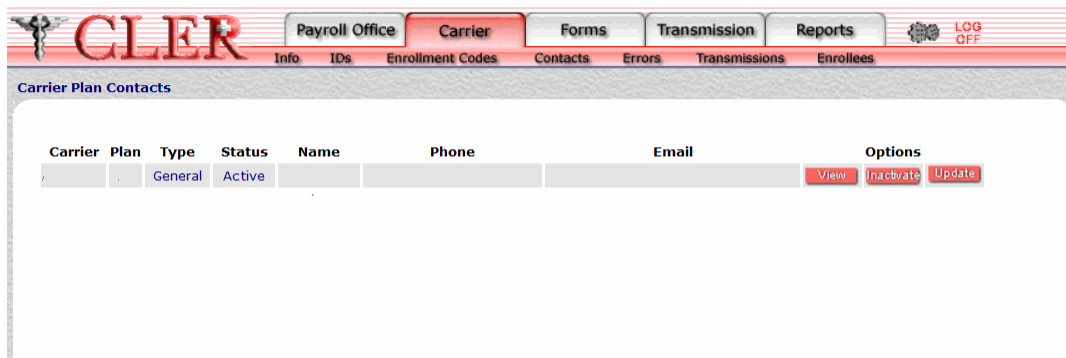


Figure 78: Carrier Plan Contacts Search Results Page

Field	Description
Carrier	<i>System generated</i> Displays the carrier code.
Plan	<i>System generated</i> Displays the first two positions of the carrier enrollment code.
Type	<i>System generated</i> Displays General type code to indicate that the payroll office contact holds an administrative position. Displays Technical type code to indicate that the payroll office contact holds a technical position.
Status	<i>System generated</i> Displays active to indicate that the record has been activated in CLER. Displays inactive to indicate that the record has been inactivated in CLER.
Name	<i>System generated</i> Displays the name of the carrier plan contact.
Phone	<i>System generated</i> Displays the carrier plan contact's telephone number.
Email	<i>System generated</i> Displays the carrier plan contact's email address.

- Click **Activate** to activate an inactivated record. A pop-up message is displayed to confirm the record has been activated.



8. Click **OK** to close the pop-up.
9. Click **Inactivate** to inactivate an activated record. A pop-up message is displayed to confirm the record has been inactivated.
10. Click **OK** to close the pop-up.

Updating a Carrier Contact Record

The Update function allows users to update carrier contact records.

To Update a Carrier Plan Contact Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

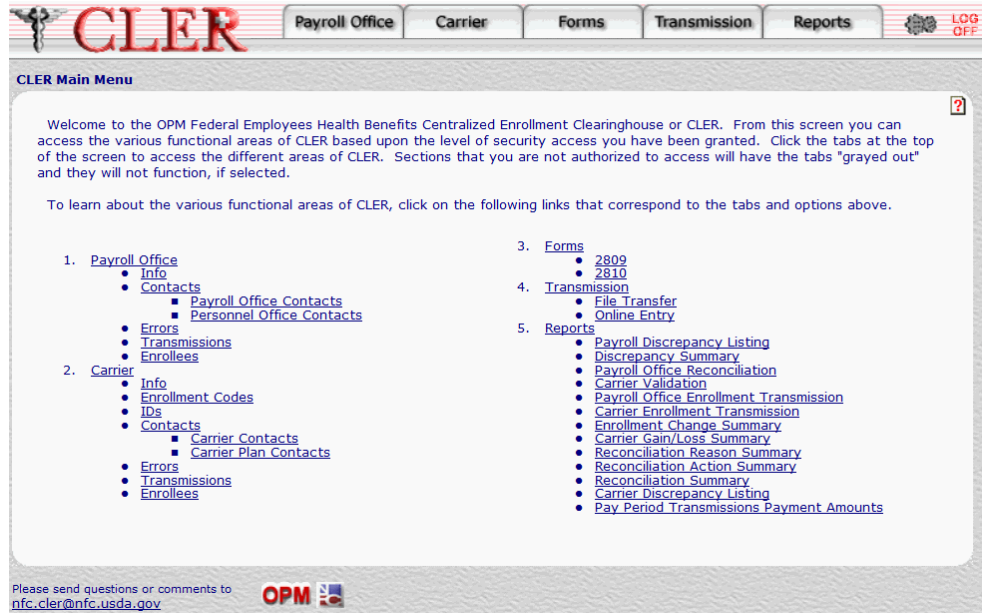


Figure 79: CLER Main Menu Page



2. The Carrier Main Page is displayed.

Carrier Main Page

In this section, the following options may be selected above:

- Info** - View and maintain information about each Carrier including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.
- Enrollment Codes** - View and maintain information about each Carrier's enrollment codes including plan, option and valid date ranges. With the proper access authority you may add new records, delete records and update existing information.
- IDs** - View and maintain information about each Carrier ID including valid date ranges and system processing values. With the proper access authority you may add new records, delete records and update existing information.
- Contacts** -
 - Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.
 - Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.
- Errors** - View error counts by type for each Carrier by processing year and quarter.
- Transmissions** - View information about each transmission file submitted by a Carrier by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.
- Enrollees** - View and validate Carrier enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter corrective action response codes.

Figure 80: Carrier Main Page

3. Select **Contacts** at the top of the Carrier Main Page. The Contacts Main Page is displayed with the Carrier Contacts and Carrier Plan Contacts options.

Contacts Main Page

Select from the following tables to view or update.

- Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address.
- Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address.

Figure 81: Contacts Main Page

4. Click the **Carrier Contacts** link to display the Carrier Contacts page.

Carrier Contacts

Click the **Add** button to add a new Carrier Contacts record. Enter selection criteria in the following fields and click the SUBMIT button to search for records based on your entries.

Carrier ID: Type:

Display: ☒ All ☐ Active ☐ Inactive

Order By: ☒ ID ☐ Type

SUBMIT **RESET**

Figure 82: Carrier Contacts Page

5. Complete the fields on the Carrier Contacts page and click **Submit**.



OR

Click **Reset** to clear all data entered.

Field	Instruction/Description
Carrier ID	<i>Required, alphanumeric, 7 positions</i> Enter the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Type	<i>Optional</i> Select either General for an administrative contact or Technical for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Display	<i>Optional, default</i> Defaults to All display option. Allows users to display search results by the options listed below. To choose a display option, select the radio button next to one of the following values: All - Displays all contacts for the payroll office ID and type code entered. Active - Displays active contacts for the payroll office ID and type code entered. Inactive - Displays inactive contacts for the payroll office ID and type code entered.
Order By	<i>Optional, default</i> Defaults to the ID sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values: ID - Search by ID number. Type - Search by type code.

6. The Carrier Contacts Search Results page is displayed.

Carrier ID	Type	Status	Name	Phone	Email	Options
	General	Inactive				View Activate Update
	General	Inactive				View Activate Update
	General	Inactive				View Activate Update
	General	Inactive				View Activate Update

Figure 83: Carrier Contacts Search Results Page



Field	Instruction/Description
Carrier ID	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Type	<i>System generated</i> Displays General type code to indicate that the payroll office contact holds an administrative position. Displays Technical type code to indicate that the payroll office contact holds a technical position.
Status	<i>System generated</i> Displays active to indicate that the record has been activated in CLER. Displays inactive to indicate that the record has been inactivated in CLER.
Name	<i>Optional, alphanumeric, 30 positions maximum</i> Enter the name of the carrier contact.
Phone	<i>System generated</i> Displays the carrier contact's telephone number.
Email	<i>System generated</i> Displays the carrier contact's email address.



7. Click **Update** next to the applicable record. The Carrier Contacts Update page is displayed.

Figure 84: Carrier Contacts Update Page

8. Complete the applicable fields on the Carrier Contacts Update page.

Field	Instruction/Description
Carrier ID*	<i>Required</i> Select the carrier ID number from the drop-down menu.
Type*	<i>Required</i> Select either General for an administrative contact or Technical for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Role	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the title, position, etc., of the carrier contact/carrier plan contact.
Name	<i>Optional, alphanumeric, 30 positions maximum</i> Enter the name of the carrier contact.



Field	Instruction/Description
Address Line 1	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the first line of the carrier contact's street or post office box address.
Address Line 2	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the second line of the carrier contact's street or post office box address.
Address Line 3	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the third line of the carrier contact's street or post office box address.
City	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the name of the carrier contact's city.
State	<i>Optional, alphanumeric, 2 positions maximum</i> Select the payroll office's, carrier's, carrier contact's, or carrier plan contact's State, U.S. territory, or overseas military abbreviation from the drop-down menu. Refer to the State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260) for a list and descriptions of State, U.S. territory, and overseas military abbreviations.
Zip	<i>Optional, alphanumeric, 11 positions maximum</i> Enter the carrier contact's ZIP Code.
Foreign Country	<i>Optional</i> Select the carrier contact's country code from the drop-down menu. For a list and descriptions of country codes, see Country Codes Table (on page 262).
Phone Number	<i>System generated</i> Displays the carrier contact's telephone number.
Fax Number	<i>Optional, alphanumeric, 25 positions</i> Enter the carrier contact's fax number.
Email Address	<i>Optional, alphanumeric, 60 positions</i> Enter the carrier contact's email address.
Remarks	<i>Optional, alphanumeric, 80 positions</i> Enter remarks about this record.

- Click **Update Record**. If no errors occur, a pop-up message is displayed to confirm the record has been updated.



10. Click **OK** to close the pop-up.

Note: To update another record, click **Cancel** to return to the Carrier Contacts Search Results page. Click **Update** next to the applicable record.

Updating a Carrier Plan Contact Record

The Update function allows users to update carrier plan contact records.

To Update a Carrier Plan Contact Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

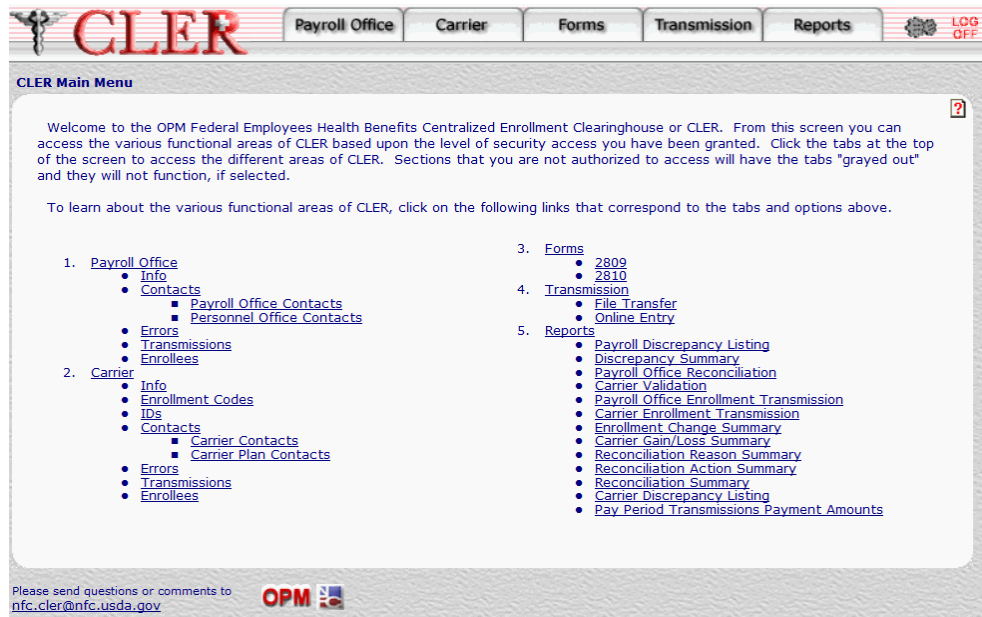


Figure 85: CLER Main Menu Page



2. The Carrier Main Page is displayed.

Carrier Main Page

In this section, the following options may be selected above:

- Info** - View and maintain information about each Carrier including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.
- Enrollment Codes** - View and maintain information about each Carrier's enrollment codes including plan, option and valid date ranges. With the proper access authority you may add new records, delete records and update existing information.
- IDs** - View and maintain information about each Carrier ID including valid date ranges and system processing values. With the proper access authority you may add new records, delete records and update existing information.
- Contacts** -
 - Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.
 - Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.
- Errors** - View error counts by type for each Carrier by processing year and quarter.
- Transmissions** - View information about each transmission file submitted by a Carrier by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.
- Enrollees** - View and validate Carrier enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter corrective action response codes.

Figure 86: Carrier Main Page

3. Select **Contacts** at the top of the Carrier Main Page. The Contacts Main Page is displayed with the Carrier Contacts and Carrier Plan Contacts options.

Contacts Main Page

Select from the following tables to view or update.

- Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address.
- Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address.

Figure 87: Contacts Main Page

4. Click the **Carrier Plan Contacts** link to display the Carrier Plan Contacts page.

Carrier Plan Contacts

Click the **Add** button to add a new Carrier Plan Contacts record. Enter selection criteria in the following fields and click the **SUBMIT** button to search for records based on your entries.

Carrier: Plan: Type:

Display: All ☒ Active ☐ Inactive ☐

Order By: Carrier ☒ Plan ☐ Type ☐

SUBMIT **RESET**

Figure 88: Carrier Plan Contacts Page

5. Complete the fields on the Carrier Plan Contacts page and click **Submit**.



OR

Click **Reset** to clear all data entered.

Field	Instruction/Description
Carrier	<i>Optional, alphanumeric, 7 positions</i> Enter the carrier ID code.
Plan	<i>Required, alphanumeric, 2 positions</i> Enter the first two positions of the carrier enrollment code.
Type	<i>Optional</i> Select either General for an administrative contact or Technical for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Display	<i>Optional, default</i> Defaults to All display option. Allows users to display search results by the options listed below. To choose a display option, select the radio button next to one of the following values: All - Displays all contacts for the payroll office ID and type code entered. Active - Displays active contacts for the payroll office ID and type code entered. Inactive - Displays inactive contacts for the payroll office ID and type code entered.
Order By	<i>Optional, default</i> Defaults to the Carrier sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values: Carrier - Search by carrier code. Plan - Search by plan code. Type - Search by type code.



6. The Carrier Plan Contacts Search Results page is displayed.

Figure 89: Carrier Plan Contacts Page

Field	Description
Carrier	<i>System generated</i> Displays the carrier ID code.
Plan	<i>System generated</i> Displays the first two positions of the carrier enrollment code.
Type	<i>System generated</i> Displays General type code to indicate that the payroll office contact holds an administrative position. Displays Technical type code to indicate that the payroll office contact holds a technical position.
Status	<i>System generated</i> Displays active to indicate that the record has been activated in CLER. Displays inactive to indicate that the record has been inactivated in CLER.
Name	<i>System generated</i> Displays the name of the carrier plan contact.
Phone	<i>System generated</i> Displays the carrier plan contact's telephone number.
Email	<i>System generated</i> Displays the carrier plan contact's email address.



- Click **Update** next to the applicable record. The Carrier Plan Contacts Update page is displayed.

Figure 90: Carrier Contacts Update Page

- Complete the applicable fields on the Carrier Plan Contacts Update page.

Field	Instruction/Description
Carrier ID*	<i>Required</i> Select the carrier ID number from the drop-down menu.
Type*	<i>Required</i> Select either General for an administrative contact or Technical for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
Role	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the title, position, etc., of the carrier contact/carrier plan contact.
Name	<i>Optional, alphanumeric, 30 positions maximum</i> Enter the name of the carrier contact.



Address Line 1	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the first line of the carrier contact's street or post office box address.
Address Line 2	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the second line of the carrier contact's street or post office box address.
Address Line 3	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the third line of the carrier contact's street or post office box address.
City	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the name of the carrier contact's city.
State	<i>Optional, alphanumeric, 2 positions maximum</i> Select the payroll office's, carrier's, carrier contact's, or carrier plan contact's State, U.S. territory, or overseas military abbreviation from the drop-down menu. Refer to the State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260) for a list and descriptions of State, U.S. territory, and overseas military abbreviations.
Zip	<i>Optional, alphanumeric, 11 positions maximum</i> Enter the carrier contact's ZIP Code.
Foreign Country	<i>Optional</i> Select the carrier contact's country code from the drop-down menu. For a list and descriptions of country codes, see Country Codes Table (on page 262).
Phone Number	<i>Optional, alphanumeric, 25 positions</i> Enter the carrier contact's telephone number.
Fax Number	<i>Optional, alphanumeric, 25 positions</i> Enter the carrier contact's fax number.
Email Address	<i>Optional, alphanumeric, 60 positions</i> Enter the carrier contact's email address.
Remarks	<i>Optional, alphanumeric, 80 positions</i> Enter remarks about this record.

9. Click **Update Record**. If no errors occur, a pop-up message is displayed to confirm the record has been updated.

10. Click **OK** to close the pop-up.



Note: To update another record, click **Cancel** to return to the Carrier Plan Contacts Search Results page. Click **Update** next to the applicable record.

Viewing Carrier Error Records

The Errors option on the Carrier Main Page allows users with the proper access authority to view error counts by type for each carrier by processing year and quarter.

To View a Carrier Error Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

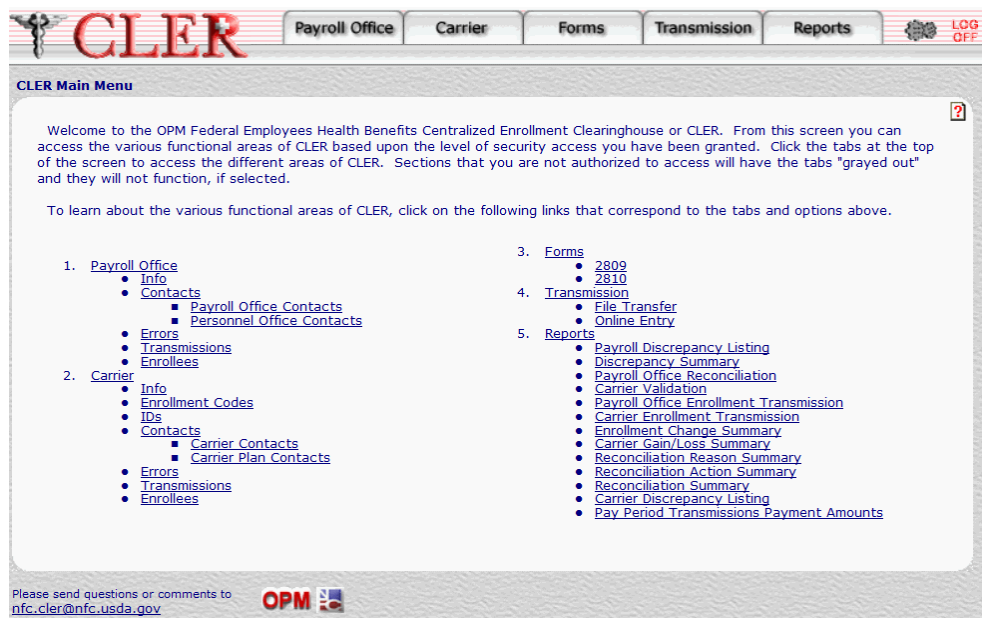


Figure 91: CLER Main Menu Page



- The Carrier Main Page is displayed.

Carrier Main Page

In this section, the following options may be selected above:

Info - View and maintain information about each Carrier including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.

Enrollment Codes - View and maintain information about each Carrier's enrollment codes including plan, option and valid date ranges. With the proper access authority you may add new records, delete records and update existing information.

IDs - View and maintain information about each Carrier ID including valid date ranges and system processing values. With the proper access authority you may add new records, delete records and update existing information.

Contacts -

Carrier Contacts - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

Carrier Plan Contacts - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.

Errors - View error counts by type for each Carrier by processing year and quarter.

Transmissions - View information about each transmission file submitted by a Carrier by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.

Enrollees - View and validate Carrier enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter corrective action response codes.

Figure 92: Carrier Main Page

- Select **Errors** at the top of the Carrier Main Page. The Carrier Errors page is displayed.

Carrier Errors

Enter selection criteria in the following fields and click the SUBMIT button to search for records based on your entries.

Carrier ID: Year: Quarter:

Order By: Carrier ID ☒ Year/Quarter ☐

Figure 93: Carrier Errors Page

- Complete the fields on the Carrier Errors page and click **Submit**.

OR

Click **Reset** to clear all data entered.

Field	Instruction/Description
Carrier ID	<i>Required, alphanumeric, 7 positions</i> Enter the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Year	<i>Optional, alphanumeric, 4 positions</i> Enter the reconciliation year for the requested error statistics.



Quarter	<i>Optional, alphanumeric, 1 position</i> Enter the reconciliation quarter for the requested error statistics.
Order By	<i>Optional, default</i> Defaults to the Carrier sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values: Carrier ID - Search by Carrier ID. Year/Quarter - Search by reconciliation year and reconciliation quarter.

5. The Carrier Errors Search Results page is displayed.

Carrier Errors

Carrier ID	Year	Quarter	Records with Errors	Records with Warnings	Total Errors	Total Warnings	Options
I	2014	2	0	0	0	0	View

Records Found: 1

Figure 94: Carrier Errors Search Results Page

Field	Description
Carrier ID	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Year	<i>System generated</i> Displays the reconciliation year for the requested error statistics.
Quarter	<i>System generated</i> Displays the reconciliation quarter for the requested error statistics.
Records with Errors	<i>System generated</i> Displays the total number of carrier enrollee records with errors. Records with warnings are not included.
Records with Warnings	<i>System generated</i> Displays the total number of carrier records with warnings. Records with errors are not included.
Total Errors	<i>System generated</i> Displays the total number of errors identified.



Total Warnings	<i>System generated</i> Displays the total number of warnings identified.
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6. Click **View** next to the applicable record. The Carrier Errors View page is displayed.

Note: To view another record, click your browser's Back button to return to the Carrier Errors Search Results page. Click **View** next to the applicable record.

Figure 95: Carrier Errors View Page

Field	Description
Carrier ID	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Year	<i>System generated</i> Displays the reconciliation year for the requested error statistics.
Quarter	<i>System generated</i> Displays the reconciliation quarter for the requested error statistics.
Records with Errors	<i>System generated</i> Displays the total number of carrier enrollee records with errors. Records with warnings are not included.
Records with Warnings	<i>System generated</i> Displays the total number of carrier records with warnings. Records with errors are not included.



Total Errors	<i>System generated</i> Displays the total number of errors identified.
Total Warnings	<i>System generated</i> Displays the total number of warnings identified.
Records Reconciled	<i>System generated</i> Displays the count of records that have a reconciliation reason and action entered for every error on the record.
Errors Reconciled	<i>System generated</i> Displays the count of errors that have a reconciliation reason and action entered.
Carrier Errors	<i>System generated</i> Displays the count of errors that have a reconciliation reason and action entered that indicates that the carrier is at fault.
Disputed Errors	<i>System generated</i> Displays the count of errors that have a reconciliation reason and action entered that indicate that the carrier is at fault and that the carrier disputes.
Confirmed Errors	<i>System generated</i> Displays the count of errors that have a reconciliation reason and action entered that indicate that the carrier is at fault and that the carrier accepts.

Maintaining Carrier Transmission Records

The Transmissions option on the Carrier Main Page allows users to view and maintain information about each transmission file submitted by a carrier by processing year and quarter.

For more information see:

Viewing a Carrier Transmission Record	122
Validating a Carrier Transmission Record	127

Viewing a Carrier Transmission Record

The View function allows users to view carrier transmission records.



To View a Carrier Transmission Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

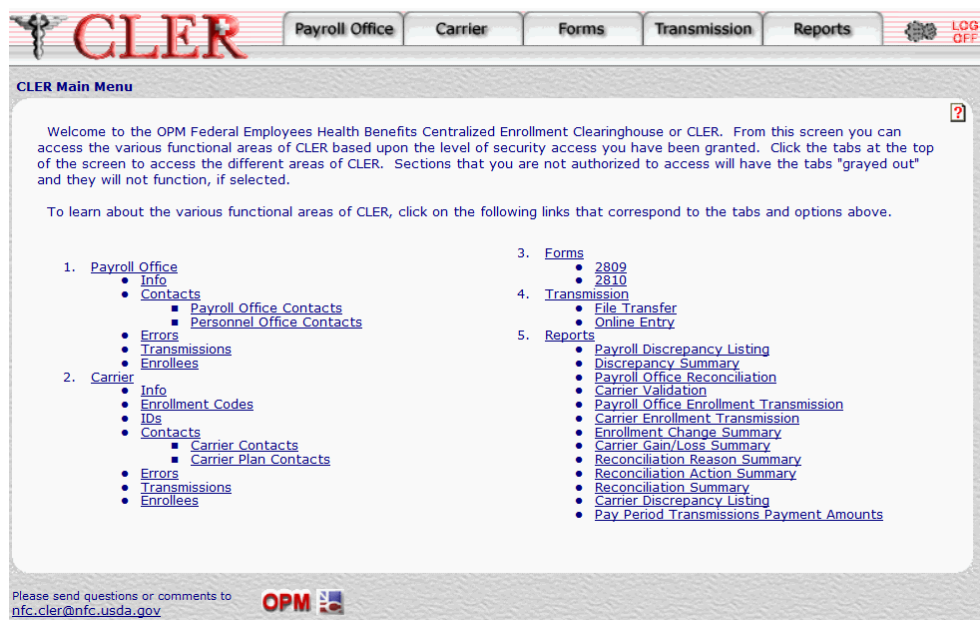


Figure 96: CLER Main Menu Page

2. The Carrier Main Page is displayed.

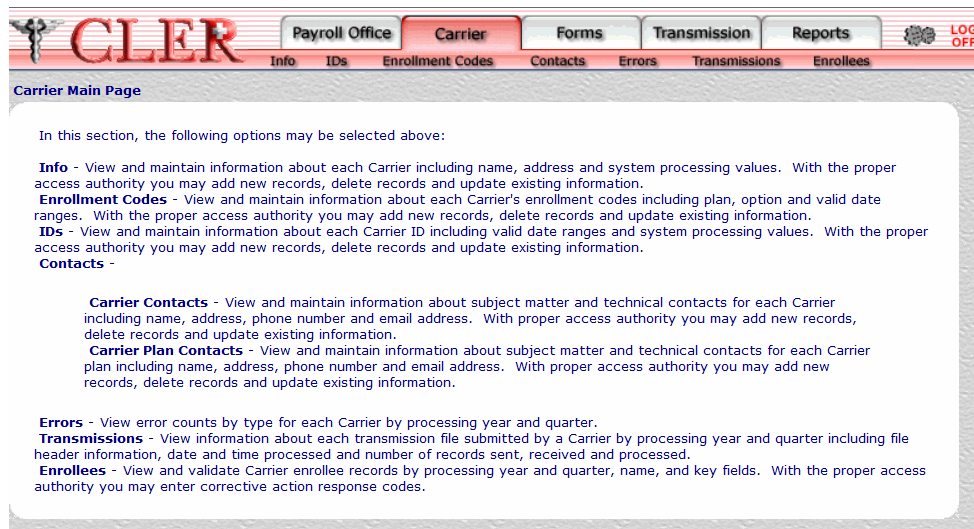


Figure 97: Carrier Main Page



3. Select **Transmissions** at the top of the Carrier Main Page. The Carrier Transmissions page is displayed.

Figure 98: Carrier Transmissions Page

4. Complete the fields on the Carrier Transmissions page and click **Submit**.

OR

Click **Reset** to clear all data entered.

Field	Instruction/Description
Carrier ID	<i>Required, alphanumeric, 7 positions</i> Enter the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Year	<i>Optional, alphanumeric, 4 positions</i> Enter the reconciliation year for the requested transmission record.
Quarter	<i>System generated</i> Displays the reconciliation quarter for the requested transmission record.
Order By	<i>Optional, default</i> Defaults to the ID sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values: ID - Search by ID number. Type - Search by type code.



- The Carrier Transmissions Search Results page is displayed.

Figure 99: Carrier Transmission Search Results Page

- Click **View** next to the applicable record. The Carrier Transmissions View page is displayed.

Note: To view another record, click your browser's Back button to return to the Carrier Transmissions Search Results page. Click **View** next to the applicable record.

Figure 100: Carrier Transmissions View Page

Field	Description
Carrier ID	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Year	<i>System generated</i> Displays the reconciliation year for the requested transmission record.



Quarter	<i>System generated</i> Displays the reconciliation quarter for the requested transmission record.
Submission	<i>System generated</i> Displays the number of transmissions submitted for the reconciliation quarter selected.
Submission Date	<i>System generated</i> Displays the date the transmission was submitted.
As of Date	<i>System generated</i> Displays the date the transmitted enrollment data was extracted.
Records Sent	<i>System generated</i> Displays the number of records sent in the transmission.
Records Received	<i>System generated</i> Displays the number of records found in the transmission file during processing.
Records Processed	<i>System generated</i> Displays the number of records accepted to store in the CLER tables.
Date Processed	<i>System generated</i> Displays the current system date when the process was run.
Time Processed	<i>System generated</i> Displays the current application time when the process was run.
Code	<i>System generated</i> Displays the transmission processing code. The code I (Initial) or blank indicates an initial file, code A (Add) indicates an additional file, and code R (Replace) indicates replace all previous files.
Status	<i>System generated</i> Displays 000 for an accepted transmission; otherwise, a carrier system code is displayed. It indicates the status of a carrier enrollment data transmission. For a list and descriptions of carrier system codes, see Carrier System Codes Table (on page 253).



Source	<p><i>System generated</i></p> <p>Displays the source of transmission data indicator. The value in the first position equals M for mainframe or S for server. The value in the second position equals T for transmission or M for manual entry.</p>
Email Date	<p><i>System generated</i></p> <p>Displays the date the last email was sent to this submitter as a reminder to send a transmission for the current reconciliation quarter.</p>
Email Time	<p><i>System generated</i></p> <p>Displays the time the last email was sent to this submitter as a reminder to send a transmission for the current reconciliation quarter.</p>
Last Validate Date	<p><i>System generated</i></p> <p>Displays the date the transmission was last validated.</p>
Last Validate Time	<p><i>System generated</i></p> <p>Displays the time the transmission was last validated.</p>
Last Validate ID	<p><i>System generated</i></p> <p>Displays the user ID number of the person who last validated the transmission.</p>
Indicator	<p><i>System generated</i></p> <p>Displays if the transmission has been validated by the carrier. Y indicates the transmission has been validated, C indicates the transmission has been cancelled, and an empty field indicates the transmission has not been validated.</p>

Validating a Carrier Transmission Record

The Validate function allows users to confirm that the carrier agrees with all of the reconciliation reason and action codes entered by the payroll offices for the enrollee records in the selected transmission file. Entries the carrier makes to dispute the reconciliation of individual enrollee records, before or after using this option, will not be affected.



To Validate a Carrier Transmission Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

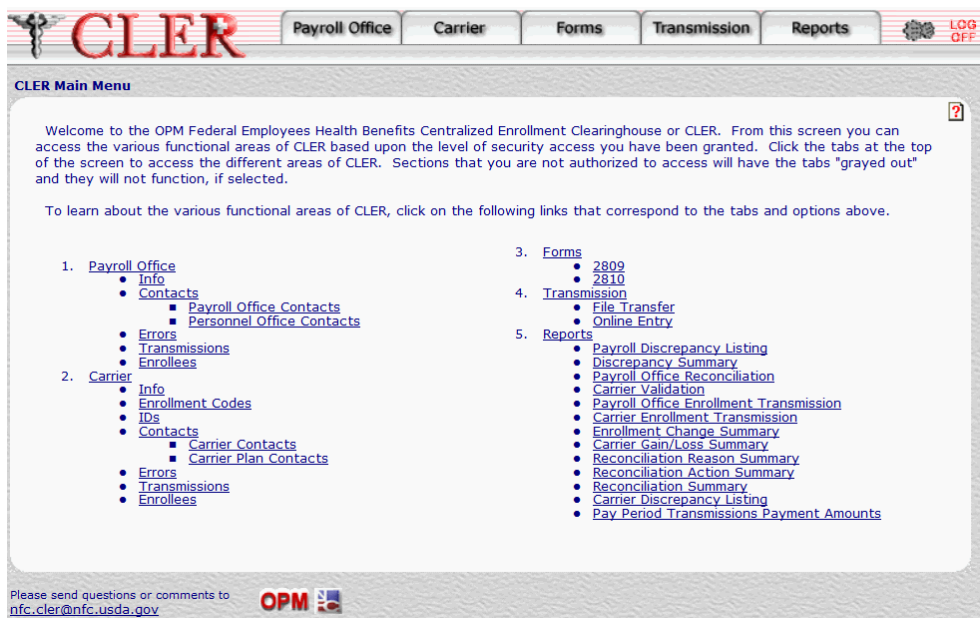


Figure 101: CLER Main Menu Page

2. The Carrier Main Page is displayed.

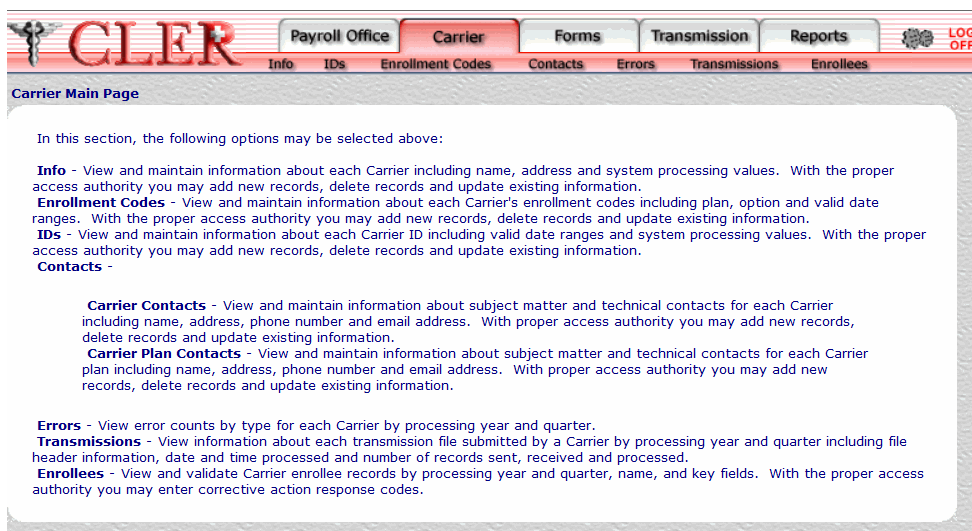


Figure 102: Carrier Main Page



3. Select **Transmissions** at the top of the Carrier Main Page. The Carrier Transmissions page is displayed.

Figure 103: Carrier Transmissions Page

4. Complete the fields on the Carrier Transmissions page and click **Submit**.

OR

Click **Reset** to clear all data entered.

Field	Instruction/Description
Carrier ID	<i>Required, alphanumeric, 7 positions</i> Enter the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Year	<i>Optional, alphanumeric, 4 positions</i> Enter the reconciliation year for the requested transmission record.
Quarter	<i>Optional, alphanumeric, 1 position</i> Enter the reconciliation quarter for the requested transmission record.
Order By	<i>Optional, default</i> Defaults to the Carrier sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values: Carrier ID - Search by carrier ID. Year/Quarter - Search by reconciliation year and reconciliation quarter.

5. The Carrier Transmissions Search Results page is displayed.



Note: The **Validate** button is displayed next to transmission files that have not been validated or whose validation has been cleared of all enrollee records that do not have individual validation entries. The **Clr Valid** button is displayed next to transmission files that have been validated.

Figure 104: Carrier Transmissions Search Results Page

Field	Description
Carrier ID	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Year	<i>System generated</i> Displays the reconciliation year for the requested transmission record.
Quarter	<i>System generated</i> Displays the reconciliation quarter for the requested transmission record.
Submission	<i>System generated</i> Displays the number of transmissions submitted for the reconciliation quarter selected.
Submission Date	<i>System generated</i> Displays the date the transmission was submitted.
Code	<i>System generated</i> Displays the transmission processing code. The code I (Initial) or blank indicates an initial file, code A (Add) indicates an additional file, and code R (Replace) indicates replace all previous files.
Status	<i>System generated</i> Displays 000 for an accepted transmission; otherwise, a carrier system code is displayed. It indicates the status of a carrier enrollment data transmission. For a list and descriptions of carrier system codes, see Carrier System Codes Table (on page 253).



Validation	<i>System generated</i> Displays the status of the validation. The Validated code is displayed when the transmission is validated. The Cleared code is displayed when the transmission validation is cleared.
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6. Click **Validate** next to the applicable transmission file to validate all enrollee records in the transmission file that do not have individual validation entries. If no errors occur, a pop-up message is displayed to confirm that the record has been validated.
7. Click **OK** to close the pop-up.
8. To clear the previous validation setting for the enrollee records in a transmission file, click **Clr Valid** next to the applicable transmission file. If no errors occur, a pop-up message is displayed to confirm the validated record has been cleared.
9. Click **OK** to close the pop-up.

Maintaining Carrier Enrollee Records

The Enrollees option on the Carrier Main Page allows users to view and validate carrier enrollee records by processing year, quarter, name, and key fields. With the proper access authority, corrective action response codes may be entered.

For more information see:

Viewing a Carrier Enrollee Record	131
Viewing a Matching Payroll Office Enrollee Record or Duplicate Carrier Enrollee Record	142
Validating a Carrier Enrollee Record	158

Viewing a Carrier Enrollee Record

The View function allows users to view carrier enrollee records.



To View a Carrier Enrollee Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

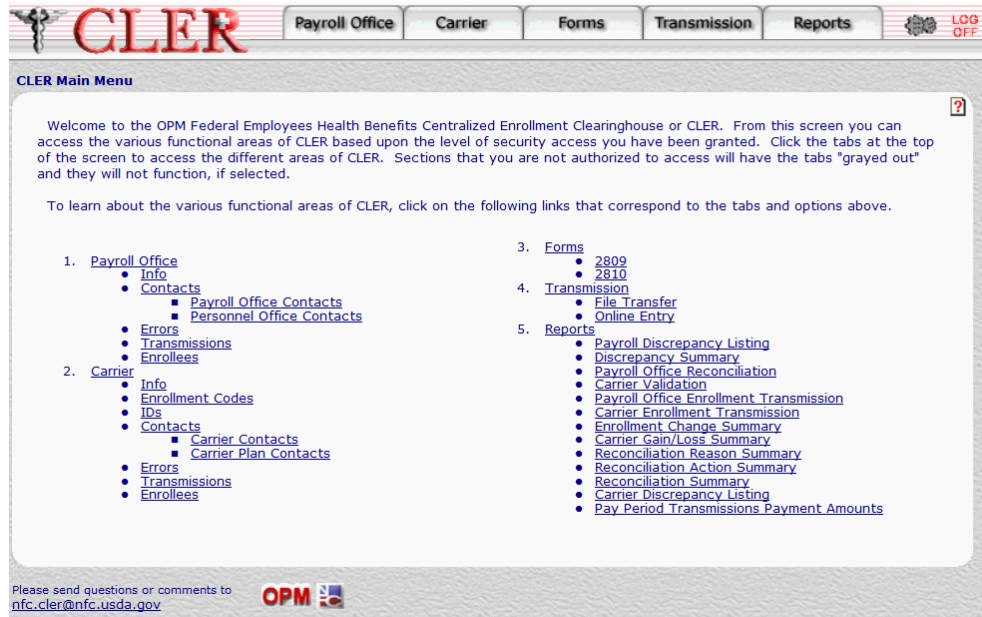


Figure 105: CLER Main Menu Page

2. The Carrier Main Page is displayed.

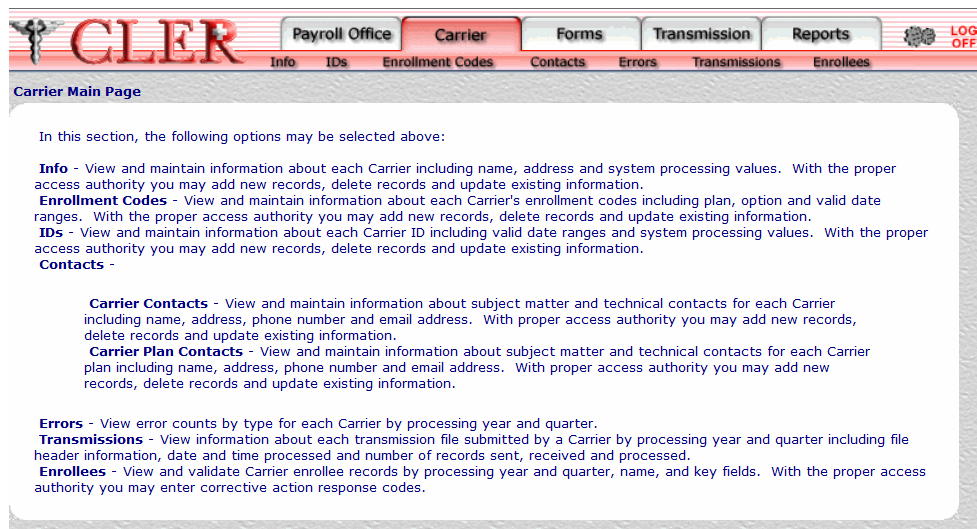


Figure 106: Carrier Main Page



3. Select **Enrollees** at the top of the Carrier Main Page. The Carrier Enrollees page is displayed.

Figure 107: Carrier Enrollees Page

4. Complete the fields on the Carrier Enrollees page and click **Submit**.

OR

Click **Reset** to clear all entered data.

Field	Instruction/Description
Carrier ID*	<i>Required</i> Select the carrier ID number from the drop-down menu.
Year*	<i>Required, default</i> Select the reconciliation year from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Quarter*	<i>Optional default</i> Select the reconciliation quarter from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Payroll Office	<i>Optional, alphanumeric, 8 position</i> Enter the payroll office identification number.



Field	Instruction/Description
Enrollment Code	<i>Optional, alphanumeric, 3 positions</i> Enter the enrollment/carrier enrollment code.
SSN - From	<i>Optional, alphanumeric, 9 positions</i> To search for a specific enrollee record by SSN, enter the SSN and skip the To field. To search for a range of enrollee records by a range of SSNs, enter the SSN that starts the range, then proceed to the To field. <u>Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</u>
SSN - To	<i>Optional, alphanumeric, 9 positions</i> To search for a range of enrollee records by a range of SSNs, enter the SSN that ends the range; otherwise, leave blank. <u>Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</u>
Last Name	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the enrollee's last name. If the enrollee has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III). If there is a case of an enrollee having only one name, enter that one name in this field.
First Name	<i>Optional, alphanumeric, 12 positions maximum</i> Enter the enrollee's first name. This must be provided with the exception of an enrollee with only one name.
Middle Name	<i>Optional, alphanumeric, 12 positions maximum</i> Enter the enrollee's middle name/initial.
Error Code	<i>Optional</i> Click the arrows to locate the applicable error code from the list of error codes and select this code. For a list and descriptions of error codes, see Discrepancy Codes Table (on page 251).
Warning Code	<i>Optional</i> Select the applicable warning code from the list of warning codes. Refer to the Warning Codes Table (on page 252) for a list and descriptions of warning codes.



Field	Instruction/Description
Display	<p><i>Optional, default</i></p> <p>Defaults to All display. This field allows users to display search results by the options listed below. To choose a display option, select the radio button next to one of the following values:</p> <p>All Records - Displays all records related to the search criteria.</p> <p>Matches - Displays all matched records related to the search criteria.</p> <p>No Matches - Displays all unmatched records related to the search criteria.</p> <p>Discrepancies - Displays all records with discrepancies related to the search criteria.</p> <p>Warnings - Displays all records with warnings related to the search criteria.</p> <p>Unreconciled - Displays all records with unreconciled discrepancies related to the search criteria.</p> <p>Reconciled - Displays all records with reconciled discrepancies related to the search criteria.</p> <p>Confirmed - Displays all records with confirmed discrepancies related to the search criteria. Confirmed discrepancies are discrepancies where the carrier is in agreement with the payroll office's reconciliation reason and reconciliation action.</p> <p>Disputed - Displays all records with disputed discrepancies related to the search criteria. Disputed discrepancies are discrepancies where the carrier is not in agreement with the payroll office's reconciliation reason and reconciliation action.</p> <p>Not Validated - Displays all records that have not been validated.</p>
Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Name sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>



Field	Instruction/Description
Order By: 2nd	<p><i>Optional, default</i></p> <p>Defaults to the SSNO sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>



Field	Instruction/Description
Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>

- The Carrier Enrollees Search Results page is displayed.

Figure 108: Carrier Enrollees Search Results Page

Field	Description
Carrier ID	<p><i>System generated</i></p> <p>Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.</p>
Year	<p><i>System generated</i></p> <p>Displays the reconciliation year.</p>
Quarter	<p><i>System generated</i></p> <p>Displays the reconciliation quarter.</p>
Enrollee SSN	<p><i>System generated</i></p> <p>Displays the enrollee's SSN.</p>
Last Name	<p><i>System generated</i></p> <p>Displays the enrollee's last name.</p>



Field	Description
First Name	<i>System generated</i> Displays the enrollee's first name.
Payroll Office	<i>System generated</i> Displays the payroll office identification number.
Code	<i>System generated</i> Displays the enrollment code.
Discrepancies	<i>System generated</i> Displays an error or warning. For lists and descriptions of error and warning codes, see Discrepancy Codes Table (on page 251) and Warning Codes Table (on page 252). <u>Note: Check marks are displayed next to discrepancy codes that have been addressed by Agencies and carriers. Red check marks are displayed next to discrepancies that have been addressed by Agencies. Green check marks are displayed next to discrepancies that have been addressed by carriers. To display the most current check marks, select Refresh at the top of the Carrier Enrollees Search Results page.</u>
Fail Count	<i>System generated</i> Displays the number of times this record has failed the quarterly edit process.



6. Click **View** next to the applicable record. The Carrier Enrollees View page is displayed.

Figure 109: Carrier Enrollees View Page

Note: To view another record, click your browser's Back button to return to the Carrier Enrollees Search Results page. Click **View** next to the applicable record.

Field	Instruction/Description
Carrier ID	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Year	<i>System generated</i> Displays the reconciliation year.



Quarter	<i>System generated</i> Displays the reconciliation quarter.
Submission	<i>System generated</i> Displays the transmission submission for this enrollee record.
Payroll Office ID	<i>System generated</i> Displays the payroll office identification number.
Enrollment Code	<i>System generated</i> Displays the enrollment code/carrier enrollment code.
SSN	<i>System generated</i> Displays the enrollee's SSN.
Last Name	<i>System generated</i> Displays the enrollee's last name.
First Name	<i>System generated</i> Displays the enrollee's first name.
Middle Name	<i>System generated</i> Displays the enrollee's middle name or initial.
Effective Date	<i>System generated</i> Displays the effective date of the enrollment.
Deceased Annuitant SSN	<i>System generated</i> Displays the deceased annuitant enrollee's SSN.
Pseudo SSN	<i>System generated</i> Displays the pseudo SSN used by the Agency and carrier to identify the enrollee.
Other Payroll ID	<i>System generated</i> Displays an identifier used by the Agency to identify the enrollee.
Other Carrier ID	<i>System generated</i> Displays an identifier used by the carrier to identify the enrollee.
Submitter Use #1	<i>System generated</i> Displays remarks that were entered by the organization that created the record/enrollment record.



Submitter Use #2	<p><i>System generated</i></p> <p>Displays remarks that were entered by the organization that created the record/enrollment record.</p>
Submitter Use #3	<p><i>System generated</i></p> <p>Displays remarks that were entered by the organization that created the record/enrollment record.</p>
Date Processed	<p><i>System generated</i></p> <p>Displays the date the record was processed.</p>
Time Processed	<p><i>System generated</i></p> <p>Displays the time the record was processed (using military time).</p>
Source	<p><i>System generated</i></p> <p>Displays the source of transmission data indicator. The value in the first position equals M for mainframe or S for server. The value in the second position equals T for transmission or M for manual entry.</p>
Fail Count	<p><i>System generated</i></p> <p>Displays the number of times this record has failed the quarterly edit process.</p>
Select another discrepancy	<p><i>Optional</i></p> <p>Select each discrepancy number to view the corresponding code and message if multiple discrepancies are shown.</p>
Discrepancy	<p><i>System generated</i></p> <p>Displays an error or warning. A short description is displayed next to the code. For a detailed explanation of the discrepancy code, click Explain or see Discrepancy Codes Table (on page 251). If Discrepancy Code 166 is displayed in the Discrepancy field, the Duplicate button is also displayed. Click Duplicate to display the duplicate carrier enrollee record for this enrollee record.</p>
Reconciliation Reason	<p><i>System generated</i></p> <p>Displays the code that identifies the cause of a discrepancy as reported by the Agency. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Reason Codes Table (on page 255).</p>
Reconciliation Action	<p><i>System generated</i></p> <p>Displays the code that identifies the action requested by the Agency to resolve a discrepancy. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Action Codes Table (on page 258).</p>



Corrective Action	<i>System generated</i> Displays the code that identifies the carrier's response to the reconciliation action code displayed in the Reconciliation Action field. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Carrier Corrective Action Response Codes Table (on page 259).
Payroll Office Comments	<i>System generated</i> Displays the payroll office's or Agency's comments.
Carrier Comments	<i>System generated</i> Displays the carrier's comments.
Last Payroll Update ID	<i>System generated</i> Displays the user ID number of the payroll office representative who made the most recent change to the record.
Last Payroll Update Date	<i>System generated</i> Displays the date of the most recent change.
Last Payroll Update Time	<i>System generated</i> Displays the time of the most recent change.
Last Carrier Update ID	<i>System generated</i> Displays the user ID number of the carrier representative/individual who made the most recent change to the record.
Last Carrier Update Date	<i>System generated</i> Displays the date of the most recent change.
Last Carrier Update Time	<i>System generated</i> Displays the the time of the most recent change.

Viewing a Matching Payroll Office Enrollee Record or Duplicate Carrier Enrollee Record

The Matching button at the top of the Carrier Enrollees View page allows users to view certain enrollee data from a payroll office enrollee record that matches a selected carrier enrollee record. Since there may be more than one matching payroll office enrollee record, a Matching button is displayed for each matching record. The Duplicate button next to the Discrepancy field on the Carrier Enrollees View page allows users to view data from another carrier enrollee record that was submitted for the same enrollee. The Matching and Duplicate functions facilitate the reconciliation process.



To View Matching Payroll Office Enrollee Records or Duplicate Carrier Enrollee Records:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

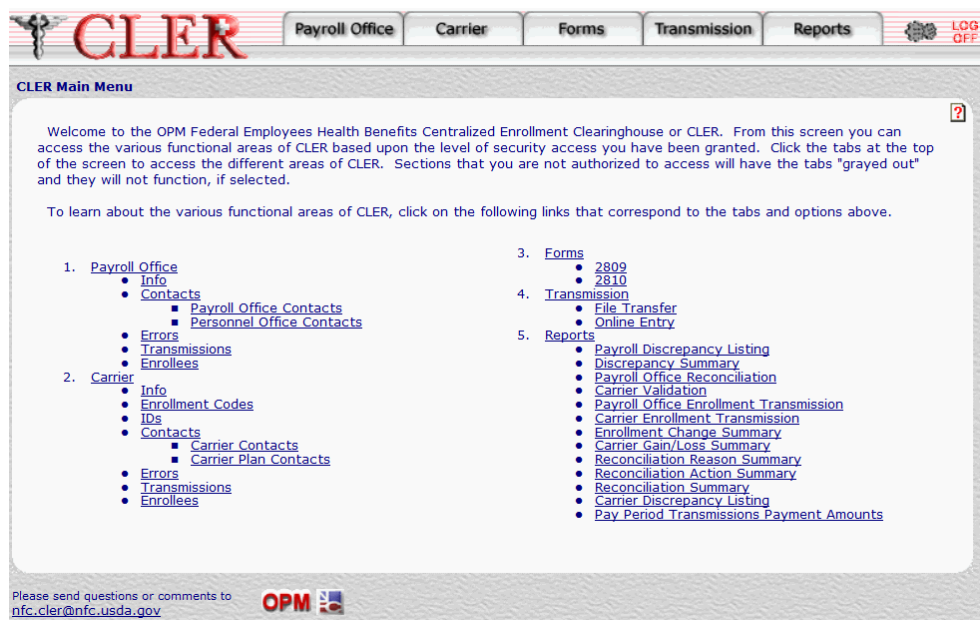


Figure 110: CLER Main Menu Page

2. The Carrier Main Page is displayed.

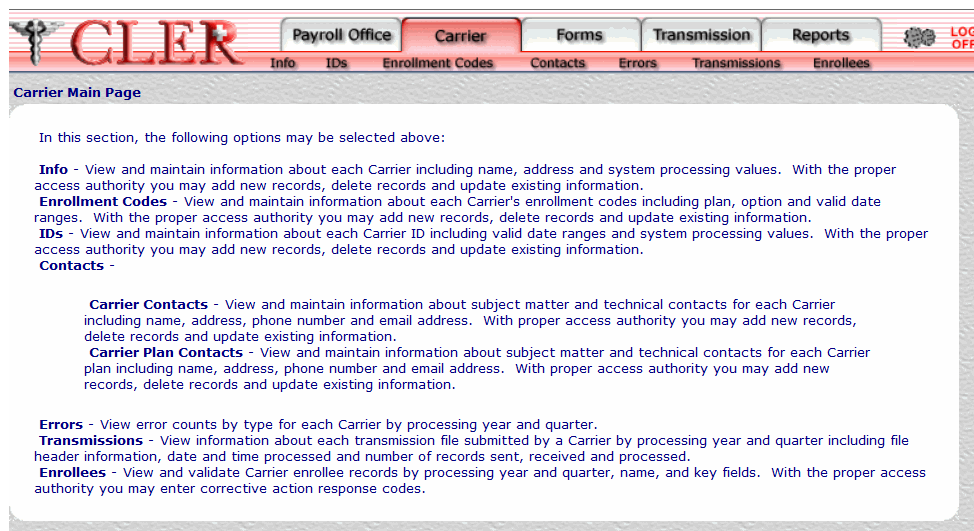


Figure 111: Carrier Main Page



3. Select **Enrollees** at the top of the Carrier Main Page. The Carrier Enrollees page is displayed.

Figure 112: Carrier Enrollees Page

4. Complete the fields on the Carrier Enrollees page and click **Submit**.

OR

Click **Reset** to clear all data entered.

Field	Instruction/Description
Carrier ID*	<i>Required</i> Select the carrier ID number from the drop-down menu.
Year*	<i>Required, default</i> Select the reconciliation year from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Quarter*	<i>Required default</i> Select the reconciliation quarter from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Payroll Office	<i>Optional, alphanumeric, 8 position</i> Enter the payroll office identification number.



Enrollment Code	<p><i>Optional, alphanumeric, 3 positions</i></p> <p>Enter the enrollment/carrier enrollment code.</p>
SSN - From	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a specific enrollee record by SSN, enter the SSN and skip the To field.</p> <p>To search for a range of enrollee records by a range of SSNs, enter the SSN that starts the range, then proceed to the To field.</p> <hr/> <p>Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p>
SSN - To	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a range of enrollee records by a range of SSNs, enter the SSN that ends the range; otherwise, leave blank.</p> <hr/> <p>Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p>
Last Name	<p><i>Optional, alphanumeric, 25 positions maximum</i></p> <p>Enter the enrollee's last name. If the enrollee has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III). If there is a case of an enrollee having only one name, enter that one name in this field.</p>
First Name	<p><i>Optional, alphanumeric, 12 positions maximum</i></p> <p>Enter the enrollee's first name. This must be provided with the exception of an enrollee with only one name.</p>
Middle Name	<p><i>Optional, alphanumeric, 12 positions maximum</i></p> <p>Enter the enrollee's middle name/initial.</p>
Error Code	<p><i>Optional</i></p> <p>Click the arrows to locate the applicable error code from the list of error codes and select this code. For a list and descriptions of error codes, see Discrepancy Codes Table (on page 251).</p>
Warning Code	<p><i>Optional</i></p> <p>Select the applicable warning code from the list of warning codes. Refer to the Warning Codes Table (on page 252) for a list and descriptions of warning codes.</p>



Display	<p><i>Optional, default</i></p> <p>Defaults to All display. This field allows users to display search results by the options listed below. To choose a display option, select the radio button next to one of the following values:</p> <p>All Records - Displays all records related to the search criteria.</p> <p>Matches - Displays all matched records related to the search criteria.</p> <p>No Matches - Displays all unmatched records related to the search criteria.</p> <p>Discrepancies - Displays all records with discrepancies related to the search criteria.</p> <p>Warnings - Displays all records with warnings related to the search criteria.</p> <p>Unreconciled - Displays all records with unreconciled discrepancies related to the search criteria.</p> <p>Reconciled - Displays all records with reconciled discrepancies related to the search criteria.</p> <p>Confirmed - Displays all records with confirmed discrepancies related to the search criteria. Confirmed discrepancies are discrepancies where the carrier is in agreement with the payroll office's reconciliation reason and reconciliation action.</p> <p>Disputed - Displays all records with disputed discrepancies related to the search criteria. Disputed discrepancies are discrepancies where the carrier is not in agreement with the payroll office's reconciliation reason and reconciliation action.</p> <p>Not Validated - Displays all records that have not been validated.</p>
Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Name sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>



Order By: 2nd	<p><i>Optional, default</i></p> <p>Defaults to the SSNO sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>



Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
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5. The Carrier Enrollees Search Results page is displayed.

Figure 113: Carrier Enrollees Search Results Page

Field	Description
Carrier ID	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Year	<i>System generated</i> Displays the reconciliation year.
Quarter	<i>System generated</i> Displays the reconciliation quarter.
Enrollee SSN	<i>System generated</i> Displays the enrollee's SSN.
Last Name	<i>System generated</i> Displays the enrollee's last name.



First Name	<i>System generated</i> Displays the enrollee's first name.
Payroll Office	<i>System generated</i> Displays the payroll office identification number.
Code	<i>System generated</i> Displays the enrollment code.
Discrepancies	<i>System generated</i> Displays an error or warning. For lists and descriptions of error and warning codes, see Discrepancy Codes Table (on page 251) and Warning Codes Table (on page 252). <hr/> Note: Check marks are displayed next to discrepancy codes that have been addressed by Agencies and carriers. Red check marks are displayed next to discrepancies that have been addressed by Agencies. Green check marks are displayed next to discrepancies that have been addressed by carriers. To display the most current check marks, select Refresh at the top of the Carrier Enrollees Search Results page.
Fail Count	<i>System generated</i> Displays the number of times this record has failed the quarterly edit process.



6. Click **View** next to the applicable record. The Carrier Enrollees View page is displayed.

Carrier Enrollees View

Use the browser Back arrow to select another record to view. To see matching Payroll Office records for this Enrollee record, click on the following button(s): #1. [Matching](#)

Carrier ID Year Quarter Submission

Payroll Office ID Enrollment Code SSN

Last Name First Name Middle Name

Effective Date

Deceased Annuitant SSN Pseudo SSN Other Payroll ID Other Carrier ID

Submitter Use #1 Submitter Use #2 Submitter Use #3

Date Processed Time Processed Source Fail Count

Select another discrepancy: 1

Discrepancy [Explain](#) [Duplicate](#)

Reconciliation Reason

Reconciliation Action

Corrective Action

Payroll Office Comments (400 character max)

Carrier Comments (400 character max)

Last Payroll Update: ID Date Time

Last Carrier Update:

Figure 114: Carrier Enrollees View Page

Field	Instruction/Description
Carrier ID	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
Year	<i>System generated</i> Displays the reconciliation year.
Quarter	<i>System generated</i> Displays the reconciliation quarter.



Submission	<i>System generated</i> Displays the transmission submission for this enrollee record.
Payroll Office ID	<i>System generated</i> Displays the payroll office identification number.
Enrollment Code	<i>System generated</i> Displays the enrollment code/carrier enrollment code.
SSN	<i>System generated</i> Displays the enrollee's SSN.
Last Name	<i>System generated</i> Displays the enrollee's last name.
First Name	<i>System generated</i> Displays the enrollee's first name.
Middle Name	<i>System generated</i> Displays the enrollee's middle name or initial.
Effective Date	<i>System generated</i> Displays the effective date of the enrollment.
Deceased Annuitant SSN	<i>System generated</i> Displays the deceased annuitant enrollee's SSN.
Pseudo SSN	<i>System generated</i> Displays the pseudo SSN used by the Agency and carrier to identify the enrollee.
Other Payroll ID	<i>System generated</i> Displays an identifier used by the Agency to identify the enrollee.
Other Carrier ID	<i>System generated</i> Displays an identifier used by the carrier to identify the enrollee.
Submitter Use #1	<i>System generated</i> Displays remarks that were entered by the organization that created the record/enrollment record.
Submitter Use #2	<i>System generated</i> Displays remarks that were entered by the organization that created the record/enrollment record.



Submitter Use #3	<i>System generated</i> Displays remarks that were entered by the organization that created the record/enrollment record.
Date Processed	<i>System generated</i> Displays the date the record was processed.
Time Processed	<i>System generated</i> Displays the time the record was processed (using military time).
Source	<i>System generated</i> Displays the source of transmission data indicator. The value in the first position equals M for mainframe or S for server. The value in the second position equals T for transmission or M for manual entry.
Fail Count	<i>System generated</i> Displays the number of times this record has failed the quarterly edit process.
Select another discrepancy	<i>Optional</i> Select each discrepancy number to view the corresponding code and message if multiple discrepancies are shown.
Discrepancy	<i>System generated</i> Displays an error or warning. A short description is displayed next to the code. For a detailed explanation of the discrepancy code, click Explain or see Discrepancy Codes Table (on page 251). If Discrepancy Code 166 is displayed in the Discrepancy field, the Duplicate button is also displayed. Click Duplicate to display the duplicate carrier enrollee record for this enrollee record.
Reconciliation Reason	<i>System generated</i> Displays the code that identifies the cause of a discrepancy as reported by the Agency. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Reason Codes Table (on page 255).
Reconciliation Action	<i>System generated</i> Displays the code that identifies the action requested by the Agency to resolve a discrepancy. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Action Codes Table (on page 258).



Corrective Action	<p><i>System generated</i></p> <p>Displays the code that identifies the carrier's response to the reconciliation action code displayed in the Reconciliation Action field. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Carrier Corrective Action Response Codes Table (on page 259).</p>
Payroll Office Comments	<p><i>System generated</i></p> <p>Displays the payroll office's or Agency's comments.</p>
Carrier Comments	<p><i>System generated</i></p> <p>Displays the carrier's comments.</p>
Last Payroll Update ID	<p><i>System generated</i></p> <p>Displays the user ID number of the payroll office representative who made the most recent change to the record.</p>
Last Payroll Update Date	<p><i>System generated</i></p> <p>Displays the date of the most recent change.</p>
Last Payroll Update Time	<p><i>System generated</i></p> <p>Displays the time of the most recent change.</p>
Last Carrier Update ID	<p><i>System generated</i></p> <p>Displays the user ID number of the carrier representative/individual who made the most recent change to the record.</p>
Last Carrier Update Date	<p><i>System generated</i></p> <p>Displays the date of the most recent change.</p>
Last Carrier Update Time	<p><i>System generated</i></p> <p>Displays the the time of the most recent change.</p>

- Click **Matching** at the top of the Carrier Enrollees View page. The Payroll Office Enrollees View page containing the data from the matching payroll office enrollee record is displayed. The data displayed on the Payroll Office Enrollees View page is limited to the payroll office ID number, carrier identifier, enrollment effective date, and the year and quarter the payroll office enrollee record was submitted.



Note: If the carrier enrollee record data displayed on the Carrier Enrollees View page is matched with the data from another carrier enrollee record, Discrepancy Code 166 is displayed in the Discrepancy field. When this discrepancy occurs, the Duplicate button is displayed next to the Discrepancy field. Click **Duplicate** to display the Carrier Enrollees View page containing the data from the matching carrier enrollee record. The data displayed on the Carrier Enrollees View page is limited to the payroll office ID number, carrier identifier, enrollment effective date, and the year and quarter the carrier enrollee record was submitted.

CLER Payroll Office Carrier Forms Transmission Reports LOG OFF

Info Contacts GROUP TRANSMISSIONS ENROLLEES

Payroll Office Enrollees View

Use the browser Back arrow to select another record to view.

Payroll Office ID 00000000 **Year** 2004 **Quarter** 1 **Submission** 1

Agency XX00 **POI** 0000 **Carrier** XXXX **Code** 000 **SSN** 000000000

Last Name Doe **First Name** John **Middle Name**

Effective Date **Amount** 422.47

Deceased Annuitant SSN **Pseudo SSN** **Other Payroll ID** **Other Carrier ID**

Submitter Use #1 **Submitter Use #2** **Submitter Use #3**

Date Processed 03 10 2004 **Time Processed** 22:31:28 **Source** **Fail Count** 7

Select another discrepancy: 1 2

Discrepancy 163 - Enrollee On Your Payroll Office Record, But No Carrier **Explain**

Reconciliation Reason 521 - Carrier Did Not Process 2809 Or 2810 Correctly **Explain**

Reconciliation Action 611 - Carrier Correction Required - Submitted By Payroll/Per **Explain**

Corrective Action

Payroll Office Comments (400 character max) **Carrier Comments** (400 character max)

Last Payroll Update: **ID** XX000 **Date** 03 31 2004 **Time** 11:27:26

Last Carrier Update:

Figure 115: Payroll Office Enrollees View Page

Field	Instruction/Description
Payroll Office ID	System generated Displays the payroll office identification number.



Year	<p><i>System generated</i></p> <p>Displays the reconciliation year.</p>
Quarter	<p><i>System generated</i></p> <p>Displays the reconciliation quarter.</p>
Submission	<p><i>System generated</i></p> <p>Displays the transmission submission for this enrollee record.</p>
Agency	<p><i>System generated</i></p> <p>Displays the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).</p> <hr/> <p>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.</p>
POI	<p><i>System generated</i></p> <p>Displays the POI of the office where the enrollee's records are maintained.</p> <hr/> <p>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.</p>
Carrier	<p><i>System generated</i></p> <p>Displays the carrier code.</p>
Enrollment Code	<p><i>System generated</i></p> <p>Displays the enrollment code/carrier enrollment code.</p>
SSN	<p><i>System generated</i></p> <p>Displays the enrollee's SSN.</p>
Last Name	<p><i>System generated</i></p> <p>Displays the enrollee's last name.</p>
First Name	<p><i>System generated</i></p> <p>Displays the enrollee's first name.</p>
Middle Name	<p><i>System generated</i></p> <p>Displays the enrollee's middle name or initial.</p>



Effective Date	<i>System generated</i> Displays the effective date of the enrollment.
Amount	<i>System generated</i> Displays the enrollee's withholding/premium.
Deceased Annuitant SSN	<i>System generated</i> Displays the deceased annuitant enrollee's SSN.
Pseudo SSN	<i>System generated</i> Displays the pseudo SSN used by the Agency and carrier to identify the enrollee.
Other Payroll ID	<i>System generated</i> Displays an identifier used by the Agency to identify the enrollee.
Other Carrier ID	<i>System generated</i> Displays an identifier used by the carrier to identify the enrollee.
Submitter Use #1	<i>System generated</i> Displays remarks that were entered by the organization that created the record/enrollment record.
Submitter Use #2	<i>System generated</i> Displays remarks that were entered by the organization that created the record/enrollment record.
Submitter Use #3	<i>System generated</i> Displays remarks that were entered by the organization that created the record/enrollment record.
Date Processed	<i>System generated</i> Displays the date the record was processed.
Time Processed	<i>System generated</i> Displays the time the record was processed (using military time).
Source	<i>System generated</i> Displays the source of transmission data indicator. The value in the first position equals M for mainframe or S for server. The value in the second position equals T for transmission or M for manual entry.
Fail Count	<i>System generated</i> Displays the number of times this record has failed the quarterly edit process.



Select another discrepancy	<p><i>Optional</i></p> <p>Select each discrepancy number to view the corresponding code and message if multiple discrepancies are shown.</p>
Discrepancy	<p><i>System generated</i></p> <p>Displays Discrepancy Code 163. A short description is displayed next to the code. To view a detailed explanation of this code, click Explain or see Discrepancy Codes Table (on page 251).</p>
Reconciliation Reason	<p><i>System generated</i></p> <p>Displays the code that identifies the cause of a discrepancy as reported by the Agency. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Reason Codes Table (on page 255).</p>
Reconciliation Action	<p><i>System generated</i></p> <p>Displays the code that identifies the action requested by the Agency to resolve a discrepancy. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Action Codes Table (on page 258).</p>
Corrective Action	<p><i>System generated</i></p> <p>Displays the code that identifies the carrier's response to the reconciliation action code displayed in the Reconciliation Action field. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Carrier Corrective Action Response Codes Table (on page 259).</p>
Payroll Office Comments	<p><i>System generated</i></p> <p>Displays the payroll office's or Agency's comments.</p>
Carrier Comments	<p><i>System generated</i></p> <p>Displays the carrier's comments.</p>
Last Payroll Update ID	<p><i>System generated</i></p> <p>Displays the user ID number of the payroll office representative who made the most recent change to the record.</p>
Last Payroll Update Date	<p><i>System generated</i></p> <p>Displays the date of the most recent change.</p>
Last Payroll Update Time	<p><i>System generated</i></p> <p>Displays the time of the most recent change.</p>



Last Carrier Update ID	<i>System generated</i> Displays the user ID number of the carrier representative/individual who made the most recent change to the record.
Last Carrier Update Date	<i>System generated</i> Displays the date of the most recent change.
Last Carrier Update Time	<i>System generated</i> Displays the the time of the most recent change.

Validating a Carrier Enrollee Record

The Validate function allows users to validate carrier enrollee records.

To Validate a Carrier Enrollee Record:

1. Select the **Carrier** tab at the top of the CLER Main Menu.

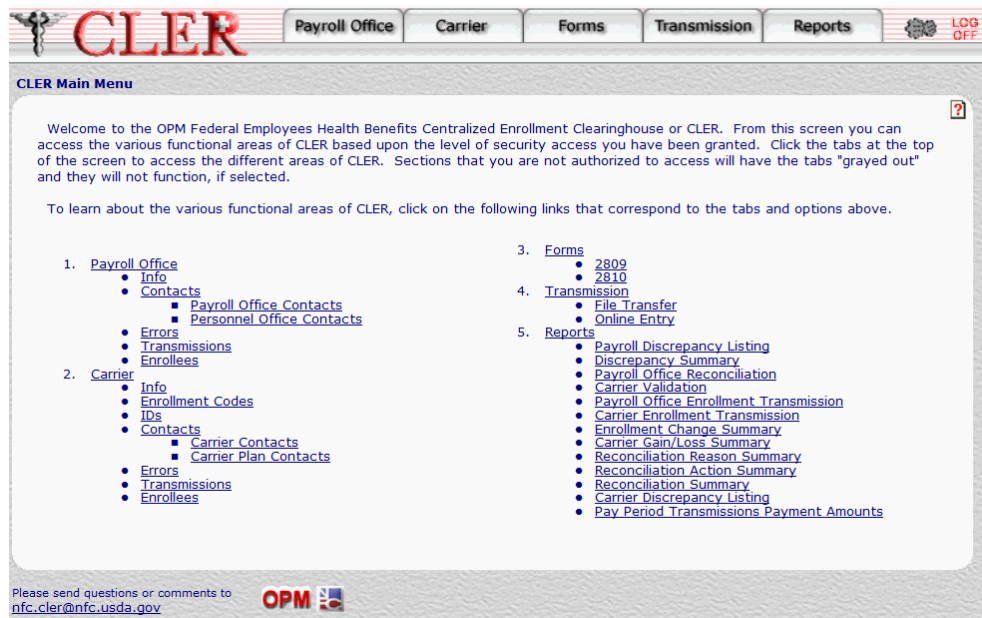


Figure 116: CLER Main Menu Page



2. The Carrier Main Page is displayed.

Carrier Main Page

In this section, the following options may be selected above:

- Info** - View and maintain information about each Carrier including name, address and system processing values. With the proper access authority you may add new records, delete records and update existing information.
- Enrollment Codes** - View and maintain information about each Carrier's enrollment codes including plan, option and valid date ranges. With the proper access authority you may add new records, delete records and update existing information.
- IDs** - View and maintain information about each Carrier ID including valid date ranges and system processing values. With the proper access authority you may add new records, delete records and update existing information.
- Contacts** -
 - Carrier Contacts** - View and maintain information about subject matter and technical contacts for each Carrier including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.
 - Carrier Plan Contacts** - View and maintain information about subject matter and technical contacts for each Carrier plan including name, address, phone number and email address. With proper access authority you may add new records, delete records and update existing information.
- Errors** - View error counts by type for each Carrier by processing year and quarter.
- Transmissions** - View information about each transmission file submitted by a Carrier by processing year and quarter including file header information, date and time processed and number of records sent, received and processed.
- Enrollees** - View and validate Carrier enrollee records by processing year and quarter, name, and key fields. With the proper access authority you may enter corrective action response codes.

Figure 117: Carrier Main Page

3. Select **Enrollees** at the top of the Carrier Main Page. The Carrier Enrollees page is displayed.

Carrier Enrollees

Enter selection criteria in the following fields and click the SUBMIT button to search for records based on your entries. Fields marked with * are required.

Carrier ID* **Year*** **Quarter***

Payroll Office **Enrollment Code** **SSN - from** **to**

Last Name **First Name** **Middle Name**

Error Code **Warning Code**

Display: All Records ☒ Matches ☐ No Matches ☐ Discrepancies ☐ Warnings ☐
Unreconciled ☐ Reconciled ☐ Confirmed ☐ Disputed ☐ Not Validated ☐

Order By: 1st **Name** 2nd **SSNO** 3rd
4th 5th

SUBMIT **RESET**

Figure 118: Carrier Enrollees Page

4. Complete the fields on the Carrier Enrollees page and click **Submit**.

OR

Click **Reset** to clear all data entered.



Field	Instruction/Description
Carrier ID*	<i>Required</i> Select the carrier ID number from the drop-down menu.
Year*	<i>Required, default</i> Select the reconciliation year from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Quarter*	<i>Optional default</i> Select the reconciliation quarter from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Payroll Office	<i>Optional, alphanumeric, 8 position</i> Enter the payroll office identification number.
Enrollment Code	<i>Optional, alphanumeric, 3 positions</i> Enter the enrollment/carrier enrollment code.
SSN - From	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a specific enrollee record by SSN, enter the SSN and skip the To field.</p> <p>To search for a range of enrollee records by a range of SSNs, enter the SSN that starts the range, then proceed to the To field.</p> <hr/> <p>Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p>
SSN - To	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a range of enrollee records by a range of SSNs, enter the SSN that ends the range; otherwise, leave blank.</p> <hr/> <p>Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p>
Last Name	<p><i>Optional, alphanumeric, 25 positions maximum</i></p> <p>Enter the enrollee's last name. If the enrollee has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III). If there is a case of an enrollee having only one name, enter that one name in this field.</p>



First Name	<p><i>Optional, alphanumeric, 12 positions maximum</i></p> <p>Enter the enrollee's first name. This must be provided with the exception of an enrollee with only one name.</p>
Middle Name	<p><i>Optional, alphanumeric, 12 positions maximum</i></p> <p>Enter the enrollee's middle name/initial.</p>
Error Code	<p><i>Optional</i></p> <p>Click the arrows to locate the applicable error code from the list of error codes and select this code. For a list and descriptions of error codes, see Discrepancy Codes Table (on page 251).</p>
Warning Code	<p><i>Optional</i></p> <p>Select the applicable warning code from the list of warning codes. Refer to the Warning Codes Table (on page 252) for a list and descriptions of warning codes.</p>
Display	<p><i>Optional, default</i></p> <p>Defaults to All display. This field allows users to display search results by the options listed below. To choose a display option, select the radio button next to one of the following values:</p> <p>All Records - Displays all records related to the search criteria.</p> <p>Matches - Displays all matched records related to the search criteria.</p> <p>No Matches - Displays all unmatched records related to the search criteria.</p> <p>Discrepancies - Displays all records with discrepancies related to the search criteria.</p> <p>Warnings - Displays all records with warnings related to the search criteria.</p> <p>Unreconciled - Displays all records with unreconciled discrepancies related to the search criteria.</p> <p>Reconciled - Displays all records with reconciled discrepancies related to the search criteria.</p> <p>Confirmed - Displays all records with confirmed discrepancies related to the search criteria. Confirmed discrepancies are discrepancies where the carrier is in agreement with the payroll office's reconciliation reason and reconciliation action.</p> <p>Disputed - Displays all records with disputed discrepancies related to the search criteria. Disputed discrepancies are discrepancies where the carrier is not in agreement with the payroll office's reconciliation reason and reconciliation action.</p> <p>Not Validated - Displays all records that have not been validated.</p>



Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Name sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
Order By: 2nd	<p><i>Optional, default</i></p> <p>Defaults to the SSNO sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>



Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>

- The Carrier Enrollees Search Results page is displayed.

Figure 119: Carrier Enrollees Search Results Page

Field	Description
Carrier ID	<p><i>System generated</i></p> <p>Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.</p>



Year	<i>System generated</i> Displays the reconciliation year.
Quarter	<i>System generated</i> Displays the reconciliation quarter.
Enrollee SSN	<i>System generated</i> Displays the enrollee's SSN.
Last Name	<i>System generated</i> Displays the enrollee's last name.
First Name	<i>System generated</i> Displays the enrollee's first name.
Payroll Office	<i>System generated</i> Displays the payroll office identification number.
Code	<i>System generated</i> Displays the enrollment code.
Discrepancies	<i>System generated</i> Displays an error or warning. For lists and descriptions of error and warning codes, see Discrepancy Codes Table (on page 251) and Warning Codes Table (on page 252). <div><u>Note: Check marks are displayed next to discrepancy codes that have been addressed by Agencies and carriers. Red check marks are displayed next to discrepancies that have been addressed by Agencies. Green check marks are displayed next to discrepancies that have been addressed by carriers. To display the most current check marks, select Refresh at the top of the Carrier Enrollees Search Results page.</u></div>
Fail Count	<i>System generated</i> Displays the number of times this record has failed the quarterly edit process.

6. Click **Validate** next to the applicable record. The Carrier Enrollees Validate page is displayed.



Note: The **Validate** button on the Carrier Enrollees Search Results page is only displayed next to records with discrepancies.

Figure 120: Carrier Enrollee Validate Page

7. Review the fields on the Carrier Enrollees Validate page.

Note: To view matching payroll office records for this enrollee record, click **Matching** at the top of the page.

Field	Instruction/Description
Carrier ID	<p><i>System generated</i></p> <p>Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.</p>



Year	<i>System generated</i> Displays the reconciliation year.
Quarter	<i>System generated</i> Displays the reconciliation quarter.
Submission	<i>System generated</i> Displays the transmission submission for this enrollee record.
Payroll Office ID	<i>System generated</i> Displays the payroll office identification number.
Enrollment Code	<i>System generated</i> Displays the enrollment code/carrier enrollment code.
SSN	<i>System generated</i> Displays the enrollee's SSN.
Last Name	<i>System generated</i> Displays the enrollee's last name.
First Name	<i>System generated</i> Displays the enrollee's first name.
Middle Name	<i>System generated</i> Displays the enrollee's middle name or initial.
Effective Date	<i>System generated</i> Displays the effective date of the enrollment.
Deceased Annuitant SSN	<i>System generated</i> Displays the deceased annuitant enrollee's SSN.
Pseudo SSN	<i>System generated</i> Displays the pseudo SSN used by the Agency and carrier to identify the enrollee.
Other Payroll ID	<i>System generated</i> Displays an identifier used by the Agency to identify the enrollee.
Other Carrier ID	<i>System generated</i> Displays an identifier used by the carrier to identify the enrollee.



Submitter Use #1	<p><i>System generated</i></p> <p>Displays remarks that were entered by the organization that created the record/enrollment record.</p>
Submitter Use #2	<p><i>System generated</i></p> <p>Displays remarks that were entered by the organization that created the record/enrollment record.</p>
Submitter Use #3	<p><i>System generated</i></p> <p>Displays remarks that were entered by the organization that created the record/enrollment record.</p>
Date Processed	<p><i>System generated</i></p> <p>Displays the date the record was processed.</p>
Time Processed	<p><i>System generated</i></p> <p>Displays the time the record was processed (using military time).</p>
Source	<p><i>System generated</i></p> <p>Displays the source of transmission data indicator. The value in the first position equals M for mainframe or S for server. The value in the second position equals T for transmission or M for manual entry.</p>
Fail Count	<p><i>System generated</i></p> <p>Displays the number of times this record has failed the quarterly edit process.</p>
Select another discrepancy	<p><i>Optional</i></p> <p>Select each discrepancy number to view the corresponding code and message if multiple discrepancies are shown.</p>
Discrepancy	<p><i>System generated</i></p> <p>Displays an error or warning. A short description is displayed next to the code. For a detailed explanation of the discrepancy code, click Explain or see Discrepancy Codes Table (on page 251). If Discrepancy Code 166 is displayed in the Discrepancy field, the Duplicate button is also displayed. Click Duplicate to display the duplicate carrier enrollee record for this enrollee record.</p>
Reconciliation Reason	<p><i>System generated</i></p> <p>Displays the code that identifies the cause of a discrepancy as reported by the Agency. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Reason Codes Table (on page 255).</p>



Reconciliation Action	<i>System generated</i> Displays the code that identifies the action requested by the Agency to resolve a discrepancy. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Action Codes Table (on page 258).
Corrective Action*	<i>System generated</i> Click from the drop-down menu and select. Displays the code that identifies the carrier's response to the reconciliation action code displayed in the Reconciliation Action field. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Carrier Corrective Action Response Codes Table (on page 259).
Payroll Office Comments	<i>System generated</i> Displays the payroll office's or Agency's comments.
Carrier Comments	<i>Conditional, alphanumeric, 400 positions maximum</i> Enter comments about this record.
Last Payroll Update ID	<i>System generated</i> Displays the user ID number of the payroll office representative who made the most recent change to the record.
Last Payroll Update Date	<i>System generated</i> Displays the date of the most recent change.
Last Payroll Update Time	<i>System generated</i> Displays the time of the most recent change.
Last Carrier Update ID	<i>System generated</i> Displays the user ID number of the carrier representative/individual who made the most recent change to the record.
Last Carrier Update Date	<i>System generated</i> Displays the date of the most recent change.
Last Carrier Update Time	<i>System generated</i> Displays the the time of the most recent change.

8. Click **Validate Record**. If no errors occur, a pop-up message is displayed to confirm the record has been validated.
9. Click **OK** to close the pop-up.



Note: To validate another record, click **Cancel** to return to the Carrier Enrollees Search Results page.
Click **Validate** next to the applicable record.



Viewing Reports

The Reports option allows users to create customized reports based on information in CLER.

This section includes the following topics:

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Viewing Payroll Discrepancy Listing (Report 1)

The Payroll Discrepancy Listing (Report 1) option on the Reports Selection page allows users to view the Payroll Discrepancy Listing report. This report provides a listing by payroll office ID number of payroll office and carrier enrollee records that match, as well as records marked with payroll office warning and discrepancy codes.



To View a Payroll Discrepancy Listing Report:

1. Select the **Reports** tab at the top of the CLER Main Menu.

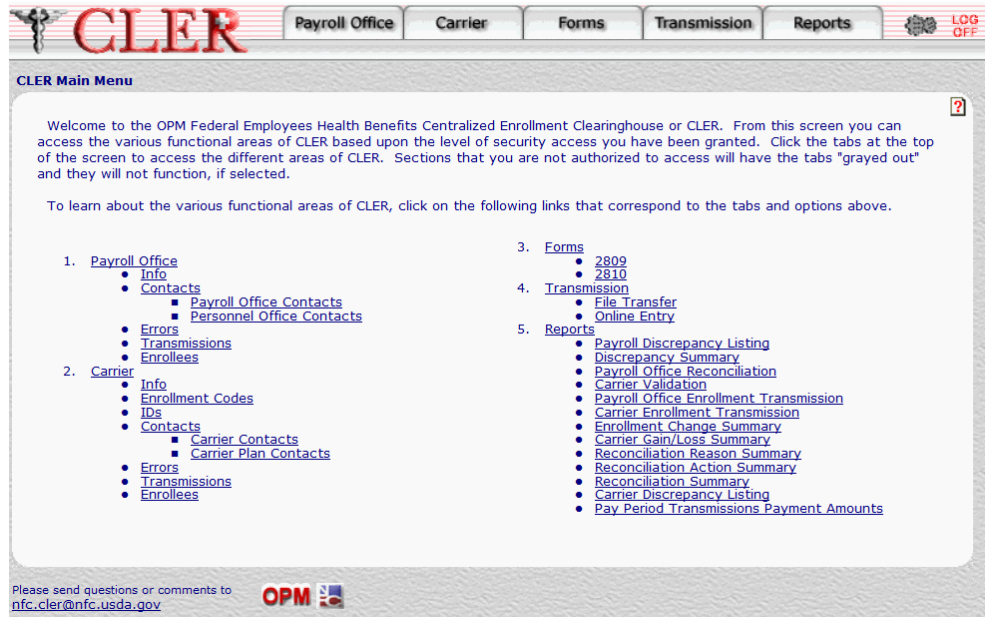


Figure 121: CLER Main Menu Page

2. The Reports Selection page is displayed.

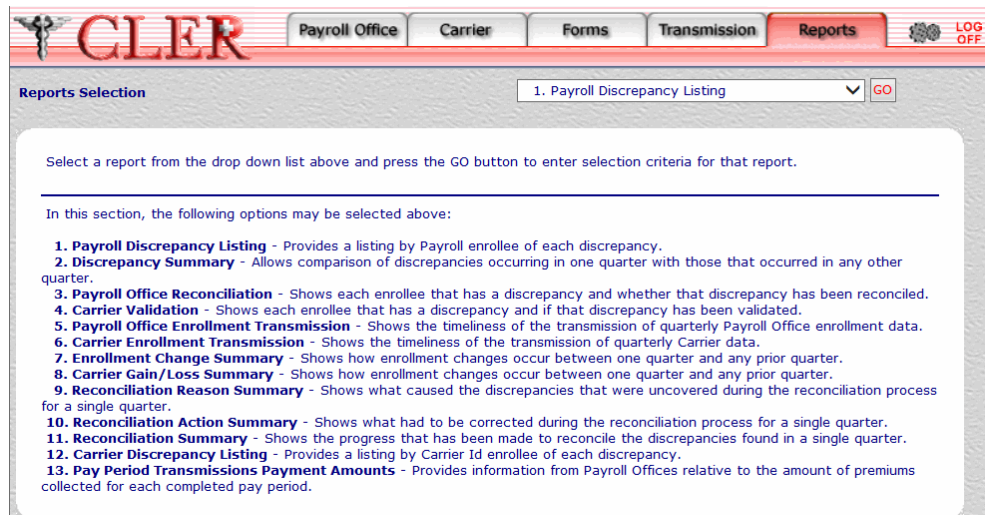


Figure 122: Reports Selection Page

3. Click the drop-down menu on the Reports Selection page and select **Payroll Discrepancy Listing**.



4. Click **GO** to display the Payroll Discrepancy Listing (Report 1) page.

Figure 123: Payroll Discrepancy Listing (Report 1) Page

5. Complete the fields on the Payroll Discrepancy Listing (Report 1) page.

Field	Instruction/Description
Payroll Office ID*	<i>Required</i> Select the payroll office identification number from the drop-down menu.
Year*	<i>Required, default</i> Select the reconciliation year from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Quarter*	<i>Required default</i> Select the reconciliation quarter from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.



Fail Count From	<p><i>Optional, numeric, 3 positions maximum.</i></p> <p>Enter a specific fail count number to search for enrollee records by a specific fail count number, then proceed to the To field.</p> <p>OR</p> <p>Enter the number that starts the range of fail count numbers to search for enrollee records by a range of fail count numbers, then proceed to the To field.</p>
Fail Count To	<p><i>Optional, numeric, 3 positions maximum</i></p> <p>Entered the number that was entered in the From field to search enrollee records by a specific fail count number.</p> <p>OR</p> <p>Enter the number that ends the range of fail count numbers to search for enrollee records by a range of fail count numbers.</p>
SSN - From	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a specific enrollee record by SSN, enter the SSN and skip the To field.</p> <p>To search for a range of enrollee records by a range of SSNs, enter the SSN that starts the range, then proceed to the To field.</p> <hr/> <p>Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p>
SSN - To	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a range of enrollee records by a range of SSNs, enter the SSN that ends the range; otherwise, leave blank.</p> <hr/> <p>Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p>



Other ID - From	<p><i>Optional, alphanumeric, 15 positions maximum</i></p> <p>To search for a specific enrollee record by Other ID, enter the Other ID and skip the To field.</p> <p>To search for a range of enrollee records by a range of Other IDs, type the Other ID that starts the range, then go to the To field.</p> <hr/> <p>Note for RSP: Enter the civil service annuitant (CSA) or civil service final (CSF) identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXXXX, and the CSF identifier is typed as FXXXXXXXXX.</p> <hr/> <p>These fields are used by the RSP and OWCP. RSP personnel use these fields to search for enrollee records by CSA or CSF identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.</p> <hr/> <p>Note: A search for enrollee records by complete Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p> <hr/>
Other ID - To	<p><i>Optional, alphanumeric, 15 positions maximum</i></p> <p>To search for a range of enrollee records by a range of Other IDs, enter the Other ID that ends the range; otherwise, leave blank.</p> <hr/> <p>Note for RSP: Enter the CSA or CSF identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXXXX, and the CSF identifier is typed as FXXXXXXXXX.</p> <hr/> <p>These fields are used by the RSP and OWCP. RSP personnel use these fields to search for enrollee records by CSA or CSF identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.</p> <hr/> <p>Note: A search for enrollee records by complete Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p> <hr/>



Agency	<i>Optional, alphanumeric, 4 positions</i> Enter the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).
Personnel Office ID	<i>Optional, alphanumeric, 4 positions</i> Enter the POI number.
Carrier	<i>Optional default</i> Select your organization's carrier code from the drop-down menu. If no code is selected, this field automatically defaults to your organization's carrier code.
Enrollment Code	<i>Optional</i> Select the enrollment code from the drop-down list.
Error Code	<i>Optional</i> Select the applicable error code from the drop-down menu. For a list and descriptions of error codes, see Discrepancy Codes Table (on page 251).
Warning Code	<i>Optional</i> Select the warning code from the drop-down menu. Refer to the Warning Codes Table (on page 252) for a list and descriptions of these codes.
Display	<i>Optional, default</i> Allows users to display search results by the options listed below. If no display option is selected, this field automatically defaults to the All option. To choose a display option, select the radio button next to one of the following values: All - Displays all records related to the search criteria. Unreconciled - Displays all records with unreconciled discrepancies related to the search criteria. Errors - Displays all records with errors related to the search criteria. Warnings - Displays all records with warnings related to the search criteria. Reconciled - Displays all records with reconciled discrepancies related to the search criteria. Matches - Displays all records with matches related to the search criteria. Not Validated - Displays records related to the search criteria that have not been validated.



Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Name sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by the RSP/OWCP to identify the enrollee.</p>
Order By: 2nd	<p><i>Optional, default</i></p> <p>Defaults to the SSNO sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Agency - Sorts search results by Agency code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/ OWCP to identify the enrollee.</p>



Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>
Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>
Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>



Order By: 6th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>
Check box to create report without totals	<p><i>Optional</i></p> <p>Select this check box to omit totals from the report.</p>

6. Click the drop-down menu at the bottom of the page and select one of the following format options:
 - Display the report
 - Save report as a spreadsheet
 - Save report as a text file
7. Click **Submit** to display the Payroll Discrepancy Listing report in the selected format.

OR

Click **Reset** to clear all data entered.



Note: If 24900002, 24900003, or 160099XX was entered in the Payroll Office ID field on the Payroll Discrepancy Listing (Report 1) page, the Payroll Discrepancy Listing (Other ID) report is displayed.

Figure 124: Payroll Discrepancy Listing Report

To return to the Payroll Discrepancy Listing (Report 1) page, close the report.

Field	Description
Payroll Office	<i>System generated</i> Displays the payroll office identification number.
SSN	<i>System generated</i> Displays the enrollee's SSN submitted by the payroll office.
Name	<i>System generated</i> Displays the enrollee's name submitted by the payroll office/carrier.
Code	<i>System generated</i> Displays the enrollment code submitted by the payroll office/carrier.
Eff. Date	<i>System generated</i> Displays the effective date (MM/DD/YYYY) submitted by the payroll office/carrier.
Whld Amt	<i>System generated</i> Displays the enrollee's withholding amount submitted by the payroll office.



Agency	<p><i>System generated</i></p> <p>Displays the Agency ID code. This code consists of the Department code and Agency code.</p> <hr/> <p>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Discrepancy Listing page.</p> <hr/>
POI	<p><i>System generated</i></p> <p>Displays the POI number.</p> <hr/> <p>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Discrepancy Listing page.</p> <hr/>
Carrier	<p><i>System generated</i></p> <p>Displays the carrier ID code.</p>
Name	<p><i>System generated</i></p> <p>Displays the enrollee's name submitted by the carrier.</p>
Code	<p><i>System generated</i></p> <p>Displays the enrollment code submitted by the carrier.</p>
Eff. Date	<p><i>System generated</i></p> <p>Displays the enrollment effective date (MM/DD/YYYY) submitted by the carrier.</p>
Discrepancy	<p><i>System generated</i></p> <p>Displays the error or warning code generated by CLER. For lists and descriptions of error and warning codes, see Discrepancy Codes Table (on page 251) and Warning Codes Table (on page 252).</p>
Fail Count	<p><i>System generated</i></p> <p>Displays the number of times the initial discrepancy has been identified and reported.</p>
Errors	<p><i>System generated</i></p> <p>Displays the sum of error codes displayed in the Discrepancy field.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p> <hr/>



Warnings	<i>System generated</i> Displays the sum of warning codes displayed in the Discrepancy field. <hr/> Note: If the check box used to omit totals from a report is selected, this field is not displayed. <hr/>
Total Records	<i>System generated</i> Displays the total number of enrollee records displayed on the report. <hr/> Note: If the check box used to omit totals from a report is selected, this field is not displayed. <hr/>

<i>Payroll Office</i>						<i>Carrier</i>				
OTHER ID	SSN	Name	Code	Eff. Date	Whld Amt	Name	Code	Eff. Date	Discrepancy	Fail Count
Errors: 0										
Warnings: 0										
Total Records: 0										
<hr/>										

Figure 125: Payroll Discrepancy Listing (Other ID) Report

Viewing Discrepancy Summary (Report 2)

The Discrepancy Summary (Report 2) option on the Reports Selection page allows users to view the Discrepancy Summary report. This report provides a comparison of the number of enrollee records with discrepancies occurring in one quarter with those that occurred in any other quarter.



To View a Discrepancy Summary Report:

1. Select the **Reports** tab at the top of the CLER Main Menu.

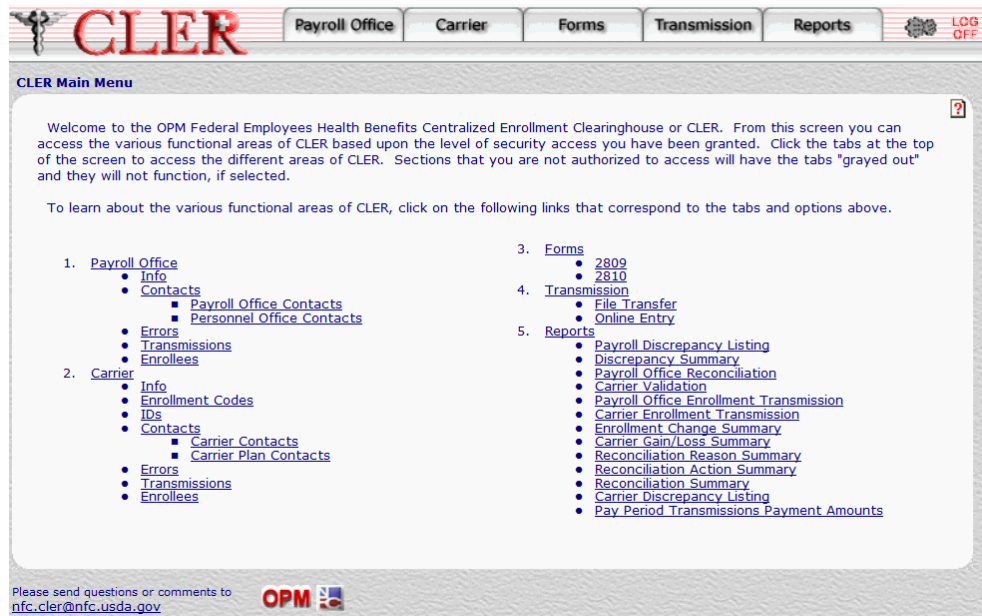


Figure 126: CLER Main Menu Page

2. The Reports Selection page is displayed.

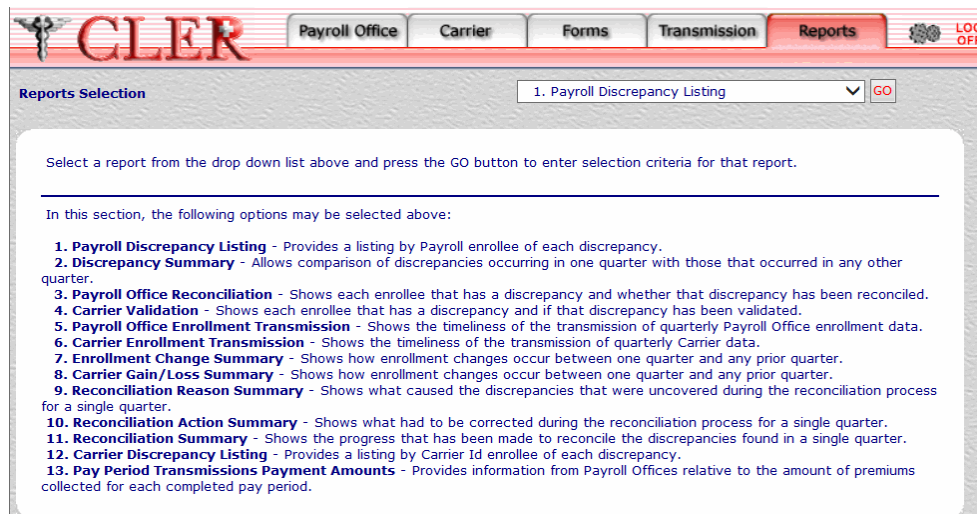


Figure 127: Reports Selection Page

3. Click the drop-down menu on the Reports Selection page and select **Discrepancy Summary**.



4. Click **GO** to display the Discrepancy Summary (Report 2) page.

Figure 128: Discrepancy Summary (Report 2) Page

5. Complete the fields on the Discrepancy Summary (Report 2) page.

Field	Instruction
Year* From	<i>Required, default</i> Select the year that begins the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Year* To	<i>Required, default</i> Select the year that ends the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Quarter* From	<i>Required, default</i> Select the quarter that begins the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Quarter* To	<i>Required, default</i> Select the quarter that ends the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Payroll Office ID*	<i>Required</i> Select the payroll office identification number from the drop-down menu.
Carrier	<i>Optional</i> Select the carrier code from the drop-down menu.



Enrollment Code	<i>Optional</i> Select the enrollment code from the drop-down list.
Fail Count From	<i>Optional, numeric, 3 positions maximum.</i> Enter a specific fail count number to search for enrollee records by a specific fail count number, then proceed to the To field. <p style="text-align: center;">OR</p> Enter the number that starts the range of fail count numbers to search for enrollee records by a range of fail count numbers, then proceed to the To field.
Fail Count To	<i>Optional, numeric, 3 positions maximum</i> Entered the number that was entered in the From field to search enrollee records by a specific fail count number. <p style="text-align: center;">OR</p> Enter the number that ends the range of fail count numbers to search for enrollee records by a range of fail count numbers.

6. Click the drop-down menu at the bottom of the page and select one of the following format options:
 - Display the report
 - Save report as a spreadsheet
 - Save report as a text file
7. Click **Submit** to display the Discrepancy Summary report in the selected format.

OR

Click **Reset** to clear all data entered.

Figure 129: Discrepancy Summary Report

To return to the Discrepancy Summary (Report 2) page, close the report.



Field	Description
Payroll Office	<i>System generated</i> Displays the payroll office identification number.
Year/Quarter From	<i>System generated</i> Displays the reconciliation year/quarter that begins the range of reconciliation years/quarters.
Year/Quarter To	<i>System generated</i> Displays the reconciliation year/quarter that ends the range of reconciliation years/quarters.
Change Actual	<i>System generated</i> Displays the number that indicates the actual changes in values between prior and current reconciliation years/quarters.
Change Percent	<i>System generated</i> Displays the percent changes in values between prior and current reconciliation years/quarters.
Total Enrollee Records	<i>System generated</i> Displays the total number of enrollees that meet the criteria entered on the Discrepancy Summary page.
Total Matches Found	<i>System generated</i> Displays the total number of matched records that meet the criteria entered on the Discrepancy Summary page.
Total Discrepancies Found	<i>System generated</i> Displays the total number of records with discrepancies that meet the criteria entered on the Discrepancy Summary page.
Total Discrepancies Reconciled	<i>System generated</i> Displays the total number of reconciled records that meet the criteria entered on the Discrepancy Summary page.
Percent Discrepancies Reconciled	<i>System generated</i> Displays the percentage of records reconciled to total discrepancies that meet the criteria entered on the Discrepancy Summary page.



Viewing Payroll Office Reconciliation (Report 3)

The Payroll Office Reconciliation (Report 3) option on the Reports Selection page allows users to view the Payroll Office Reconciliation report. This report lists each enrollee record that has a discrepancy and indicates whether that discrepancy has been reconciled.

To View a Payroll Office Reconciliation Report:

1. Select the **Reports** tab at the top of the CLER Main Menu.

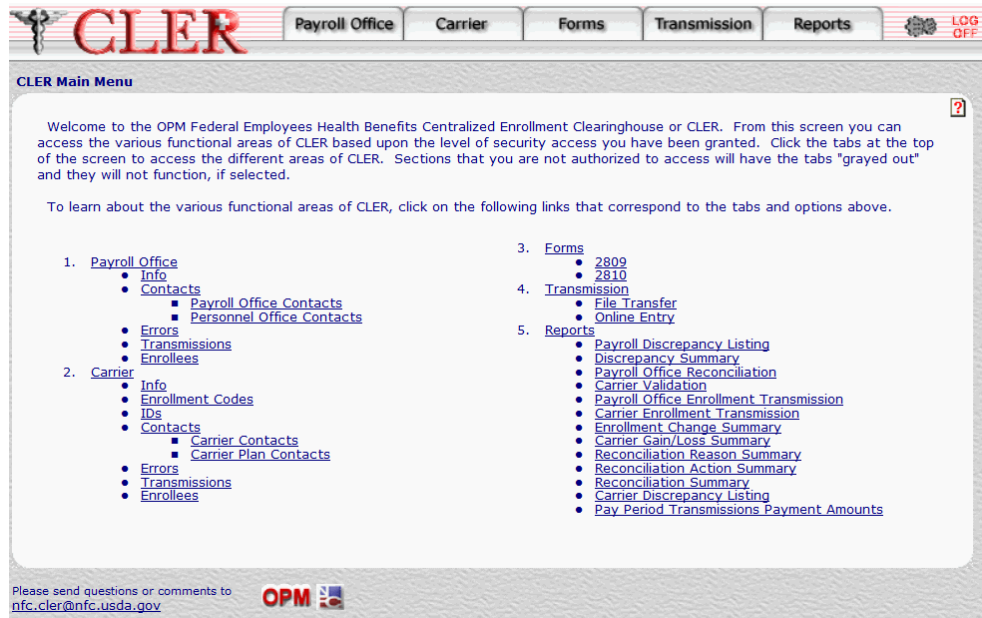


Figure 130: CLER Main Menu Page

2. The Reports Selection page is displayed.

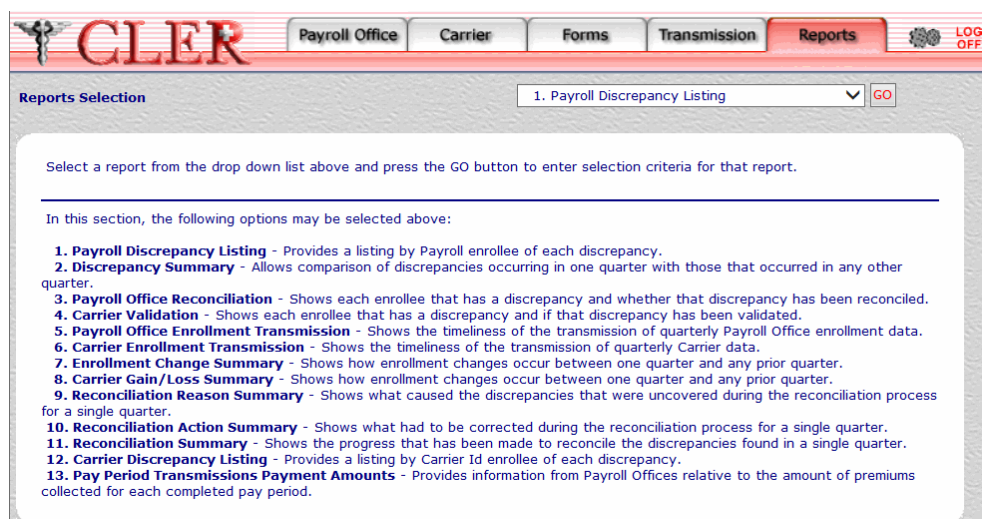


Figure 131: Report Selection Page



- Click the drop-down menu on the Reports Selection page and select **Payroll Office Reconciliation**.
- Click **GO** to display the Payroll Office Reconciliation (Report 3) page.

Figure 132: Payroll Office Reconciliation (Report 3) Page

- Complete the fields on the Payroll Office Reconciliation (Report 3) page.

Field	Instruction/Description
Payroll Office ID*	<i>Required</i> Select the payroll office identification number from the drop-down menu.
Year*	<i>Required, default</i> Select the reconciliation year from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Quarter*	<i>Required default</i> Select the reconciliation quarter from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.



Fail Count From	<p><i>Optional, numeric, 3 positions maximum.</i></p> <p>Enter a specific fail count number to search for enrollee records by a specific fail count number, then proceed to the To field.</p> <p style="text-align: center;">OR</p> <p>Enter the number that starts the range of fail count numbers to search for enrollee records by a range of fail count numbers, then proceed to the To field.</p>
Fail Count To	<p><i>Optional, numeric, 3 positions maximum</i></p> <p>Entered the number that was entered in the From field to search enrollee records by a specific fail count number.</p> <p style="text-align: center;">OR</p> <p>Enter the number that ends the range of fail count numbers to search for enrollee records by a range of fail count numbers.</p>
Reconciliation Date From	<p><i>Optional</i></p> <p>This is the date that begins the range of reconciliation dates. To select this date, select the month from the first drop-down menu, select the day from the second drop-down menu, and select the year from the third drop-down menu.</p>
Reconciliation Date To	<p><i>Optional</i></p> <p>This is the date that ends the range of reconciliation dates. To select this date, select the month from the first drop-down menu, select the day from the second drop-down menu; and select the year from the third drop-down menu.</p>
SSN - From	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a specific enrollee record by SSN, enter the SSN and skip the To field.</p> <p>To search for a range of enrollee records by a range of SSNs, enter the SSN that starts the range, then proceed to the To field.</p> <hr/> <p>Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p> <hr/>



SSN - To	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a range of enrollee records by a range of SSNs, enter the SSN that ends the range; otherwise, leave blank.</p> <hr/> <p>Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p> <hr/>
Agency	<p><i>Optional, alphanumeric, 4 positions</i></p> <p>Enter the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).</p>
Personnel Office ID	<p><i>Optional, alphanumeric, 4 positions</i></p> <p>Enter the personnel office identification (POI) number.</p>
Carrier	<p><i>Optional</i></p> <p>Select the carrier code from the drop-down menu.</p>
Enrollment Code	<p><i>Optional</i></p> <p>Select the enrollment code from the drop-down list.</p>
User ID	<p><i>Optional, alphanumeric, 8 positions maximum</i></p> <p>Enter the user identification number of the person creating the report.</p>



Other ID - From	<p><i>Optional, alphanumeric, 15 positions maximum</i></p> <p>To search for a specific enrollee record by Other ID, enter the Other ID and skip the To field.</p> <p>To search for a range of enrollee records by a range of Other IDs, type the Other ID that starts the range, then go to the To field.</p> <hr/> <p>Note for RSP: Enter the civil service annuitant (CSA) or civil service final (CSF) identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXXXX, and the CSF identifier is typed as FXXXXXXXXX.</p> <hr/> <p>These fields are used by the RSP and OWCP. RSP personnel use these fields to search for enrollee records by CSA or CSF identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.</p> <hr/> <p>Note: A search for enrollee records by complete Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p> <hr/>
Other ID - To	<p><i>Optional, alphanumeric, 15 positions maximum</i></p> <p>To search for a range of enrollee records by a range of Other IDs, enter the Other ID that ends the range; otherwise, leave blank.</p> <hr/> <p>Note for RSP: Enter the CSA or CSF identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXXXX, and the CSF identifier is typed as FXXXXXXXXX.</p> <hr/> <p>These fields are used by the RSP and OWCP. RSP personnel use these fields to search for enrollee records by CSA or CSF identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.</p> <hr/> <p>Note: A search for enrollee records by complete Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p> <hr/>



Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Name sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Agency - Search results by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reconciliation Date - Search by reconciliation date.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p> <p>User ID - Search by user ID number.</p>
Order By: 2nd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reconciliation Date - Search by reconciliation date.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p> <p>User ID - Search by user ID number.</p>



Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reconciliation Date - Search by reconciliation date.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p> <p>User ID - Search by user ID number.</p>
Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reconciliation Date - Search by reconciliation date.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p> <p>User ID - Search by user ID number.</p>



Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reconciliation Date - Search by reconciliation date.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p> <p>User ID - Search by user identification number.</p>
Order By: 6th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reconciliation Date - Search by reconciliation date.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p> <p>User ID - Search by user identification number.</p>
Check box to create report without totals	<p><i>Optional</i></p> <p>Select this check box to omit totals from the report.</p>

6. Click the drop-down menu at the bottom of the page and select one of the following format options:

- Display the report



- Save report as a spreadsheet
- Save report as a text file

7. Click **Submit** to display the Payroll Office Reconciliation report in the selected format.

OR

Click **Reset** to clear all data entered.

Note: If 24900002, 24900003, or 160099XX was entered in the Payroll Office ID field on the Payroll Office Reconciliation (Report 3) page, the Payroll Office Reconciliation (Other ID) report is displayed.

Figure 133: Payroll Office Reconciliation Report Page

To return to the Payroll Office Reconciliation (Report 3) page, close the report.

Field	Description
SSN	<i>System generated</i> Displays the enrollee's SSN.
Name	<i>System generated</i> Displays the enrollee's name submitted by the payroll office/carrier.
Carrier	<i>System generated</i> Displays the carrier ID code.
Agency	<i>System generated</i> Displays the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer). <u>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.</u>



POI	<i>System generated</i> Displays the POI of the office where the enrollee's records are maintained. <u>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.</u>
Code	<i>System generated</i> Displays the enrollment code.
Reconciliation Reason	<i>System generated</i> Displays the reconciliation reason code. For a list and descriptions of reconciliation reason codes, see Reconciliation Reason Codes Table (on page 255).
Reconciliation Date	<i>System generated</i> Displays the reconciliation date.
Reconciliation User ID	<i>System generated</i> Displays the user identification number of the person who entered the reconciliation reason code.
Reconciliation Action	<i>System generated</i> Displays the reconciliation action code. For a list and descriptions of reconciliation action codes, see Reconciliation Action Codes Table (on page 258).
Reconciliation Fail Count	<i>System generated</i> Displays the number of times the initial discrepancy has been identified.
With Errors	<i>System generated</i> Displays the sum of enrollee records with codes in the Reason and Action fields. <u>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</u>
Without Errors	<i>System generated</i> Displays the sum of enrollee records with no codes in the Reason and Action fields. <u>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</u>



Total Records	<p><i>System generated</i></p> <p>Displays the the sum of enrollee records on the report.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p>
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Payroll Office Reconciliation									
					Reconciliation				
OTHER ID	SSN	Name	Carrier	Code	Reason	Date	User ID	Action	Fail Count
With Errors: 0 Without Errors: 0 Total Records: 0									

Figure 134: Payroll Office Reconciliation (Other ID) Report Page

Viewing Carrier Validation (Report 4)

The Carrier Validation (Report 4) option on the Reports Selection page allows users to view the Carrier Reconciliation report. This report lists each enrollee record that has a discrepancy that the payroll office has determined to be a problem with the carrier's records.



To View a Carrier Validation Report:

1. Select the **Reports** tab at the top of the CLER Main Menu.

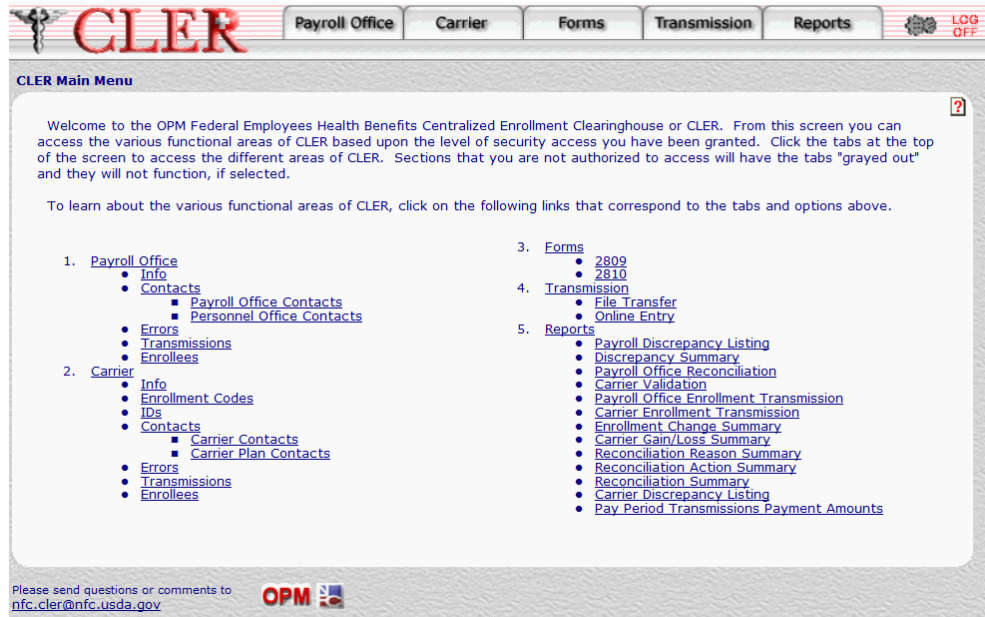


Figure 135: CLER Main Menu Page

2. The Reports Selection page is displayed.

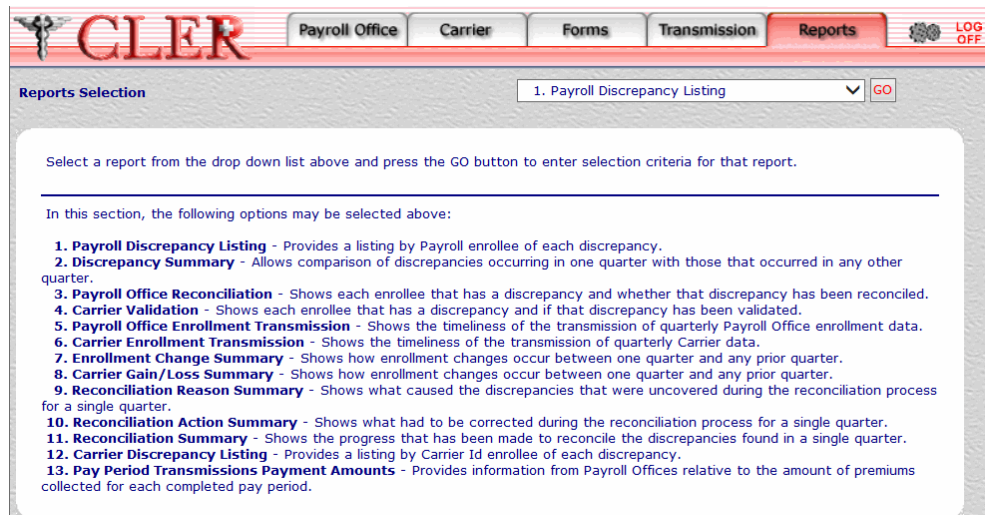


Figure 136: Reports Selection Page

3. Click the drop-down menu on the Reports Selection page and select **Carrier Validation**.



- Click **GO** to display the Carrier Validation.

Figure 137: Carrier Validation (Report 4) Page

- Complete the fields on the Carrier Reconciliation (Report 4) page.

Field	Instruction/Description
Carrier ID*	<i>Required</i> Select the carrier ID number from the drop-down menu.
Year*	<i>Required, default</i> Select the reconciliation year from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Quarter*	<i>Required default</i> Select the reconciliation quarter from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Fail Count From	<i>Optional, numeric, 3 positions maximum.</i> Enter a specific fail count number to search for enrollee records by a specific fail count number, then proceed to the To field. OR Enter the number that starts the range of fail count numbers to search for enrollee records by a range of fail count numbers, then proceed to the To field.



Fail Count To	<p><i>Optional, numeric, 3 positions maximum</i></p> <p>Entered the number that was entered in the From field to search enrollee records by a specific fail count number.</p> <p>OR</p> <p>Enter the number that ends the range of fail count numbers to search for enrollee records by a range of fail count numbers.</p>
Validation Date From	<p><i>Optional</i></p> <p>Select the month from the first drop-down menu, select the day from the second drop-down menu; and select the year from the third drop-down menu. This is the date that begins the range of reconciliation dates.</p>
Validation Date To	<p><i>Optional</i></p> <p>Select the month from the first drop-down menu, select the day from the second drop-down menu; and select the year from the third drop-down menu. This is the date that ends the range of reconciliation dates.</p>
SSN - From	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a specific enrollee record by SSN, enter the SSN and skip the To field.</p> <p>To search for a range of enrollee records by a range of SSNs, enter the SSN that starts the range, then proceed to the To field.</p> <hr/> <p>Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p> <hr/>
SSN - To	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a range of enrollee records by a range of SSNs, enter the SSN that ends the range; otherwise, leave blank.</p> <hr/> <p>Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p> <hr/>
Payroll Office ID	<p><i>Required</i></p> <p>Select the payroll office identification number from the drop-down menu.</p>



Enrollment Code	<p><i>Optional</i></p> <p>Select the enrollment code from the drop-down list.</p>
User ID	<p><i>Optional, alphanumeric, 8 positions maximum</i></p> <p>Enter the user identification number of the person creating the report.</p>
Other ID - From	<p><i>Optional, alphanumeric, 15 positions maximum</i></p> <p>To search for a specific enrollee record by Other ID, enter the Other ID and skip the To field.</p> <p>To search for a range of enrollee records by a range of Other IDs, type the Other ID that starts the range, then go to the To field.</p> <hr/> <p>Note for RSP: Enter the civil service annuitant (CSA) or civil service final (CSF) identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXXXX, and the CSF identifier is typed as FXXXXXXXXX.</p> <hr/> <p>These fields are used by the RSP and OWCP. RSP personnel use these fields to search for enrollee records by CSA or CSF identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.</p> <hr/> <p>Note: A search for enrollee records by complete Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p> <hr/>



Other ID - To	<p><i>Optional, alphanumeric, 15 positions maximum</i></p> <p>To search for a range of enrollee records by a range of Other IDs, enter the Other ID that ends the range; otherwise, leave blank.</p> <hr/> <p>Note for RSP: Enter the CSA or CSF identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXXXX, and the CSF identifier is typed as FXXXXXXXXX.</p> <hr/> <p>These fields are used by the RSP and OWCP. RSP personnel use these fields to search for enrollee records by CSA or CSF identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.</p> <hr/> <p>Note: A search for enrollee records by complete Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p> <hr/>
Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Name sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
Order By: 2nd	<p><i>Optional</i></p> <p>Defaults to the Name sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>



Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
Order By: 6th	<p><i>Optional</i></p> <p>Defaults to the Name sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
Check box to create report without totals	<p><i>Optional</i></p> <p>Select this check box to omit totals from the report.</p>

6. Click the drop-down menu at the bottom of the page and select one of the following format options:
 - Display the report
 - Save report as a spreadsheet
 - Save report as a text file
7. Click **Submit** to display the Carrier Reconciliation report in the selected format.



OR

Click **Reset** to clear all data entered.

Carrier Validation								
Carrier					Validation			
SSN	Enrollee	Enrollment Code	Payroll Office Number	Reason Code	Validation Date	User Id	Corrective Action	Fail Count
Total Records: 0								

Figure 138: Carrier Validation Report Page

To return to the Carrier Reconciliation (Report 4) page, close the report.

Field	Description
Carrier	<i>System generated</i> Displays the carrier ID code.
SSN	<i>System generated</i> Displays the enrollee's SSN.
Enrollee	<i>System generated</i> Displays the enrollee's name.
Enrollment Code	<i>System generated</i> Displays the enrollment code/carrier enrollment code.
Payroll Office Number	<i>System generated</i> Displays the payroll office number.
Reason	<i>System generated</i> Displays the reconciliation reason code. For a list and descriptions of reconciliation reason codes, see Reconciliation Reason Codes Table (on page 255).
Validation	<i>System generated</i> Displays the status of the validation.
Validation Date	<i>System generated</i> Displays the validation date.



User ID	<i>System generated</i> Displays the user identification number of the person who entered the validation reason code.
Corrective Action	<i>System generated</i> Displays the code that identifies the carrier's response to the validation action code displayed in the Validation Action field.
Fail Count	<i>System generated</i> Displays the number of times this record has failed the quarterly edit process.
Total Records	<i>System generated</i> Displays the total number of enrollee records displayed on the report. <hr/> Note: If the check box used to omit totals from a report is selected, this field is not displayed.

Viewing Payroll Office Enrollment Transmission (Report 5)

The Payroll Office Enrollment Transmission option on the Reports Selection page allows authorized users to view the Payroll Office Enrollment Transmission report. This report provides information regarding the timeliness of the transmission of quarterly payroll office enrollment data.

Note: Carriers are not authorized to produce this report.

Viewing Carrier Enrollment Transmission (Report 6)

The Carrier Enrollment Transmission (Report 6) option on the Reports Selection page allows users to view the Carrier Enrollment Transmission report. This report provides information regarding the timeliness of the transmission of quarterly carrier enrollment data.



To View a Carrier Enrollment Transmission Report:

1. Select the **Reports** tab at the top of the CLER Main Menu.

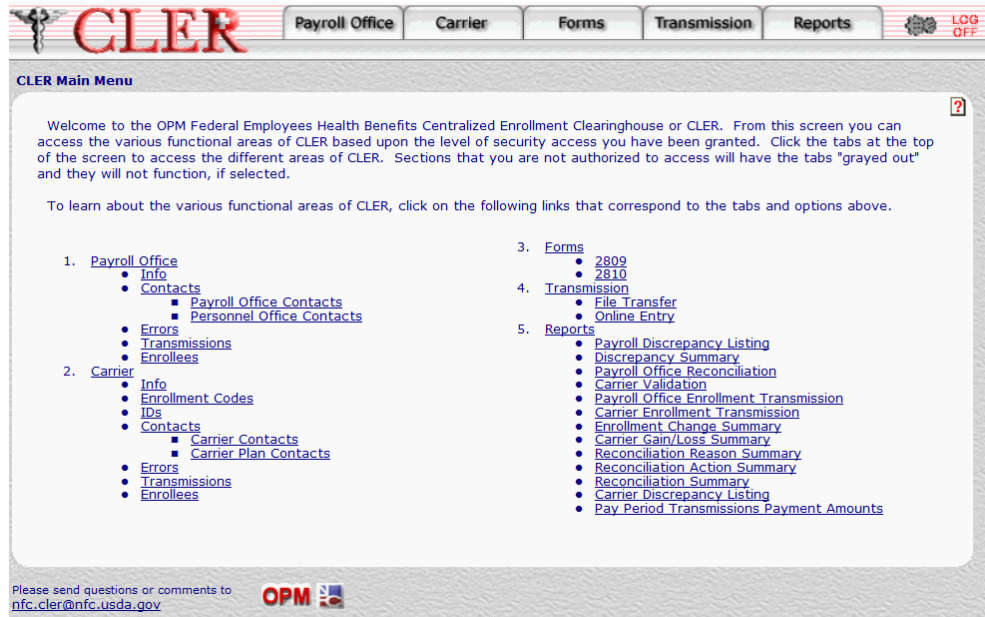


Figure 139: CLER Main Menu Page

2. The Reports Selection page is displayed.

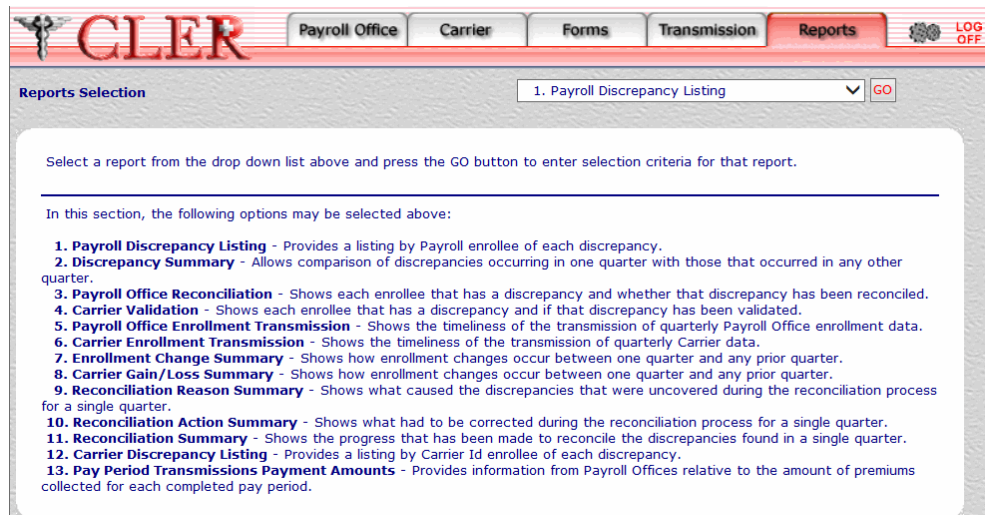


Figure 140: Reports Selection Page

3. Click the drop-down menu on the Reports Selection page and select **Carrier Enrollment Transmission**.



4. Click **GO** to display the Carrier Enrollment Transmission (Report 6) page.

Figure 141: Carrier Enrollment Transmission (Report 6) Page

5. Complete the fields on the Carrier Enrollment Transmission (Report 6) page.

Field	Instruction/Description
Year* From	<i>Required, default</i> Select the year that begins the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Year* To	<i>Required, default</i> Select the year that ends the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Quarter* From	<i>Required, default</i> Select the quarter that begins the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Quarter* To	<i>Required, default</i> Select the quarter that ends the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Carrier Id	<i>Required</i> Select the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit from the drop-down menu.



Transmissions	<p><i>Optional, default</i></p> <p>Displays search results by the options listed below. If no display option is selected, this field automatically defaults to the All display option. To choose a display option, select the radio button next to one of the following values:</p> <p>All - Search by all transmissions.</p> <p>Accepted - Search by accepted transmissions.</p> <p>Rejected - Search by rejected transmissions.</p> <p>Not Received - Search by not received transmissions.</p>
Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Name sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Carrier ID - Search by carrier ID number.</p> <p>Name - Search by enrollee name.</p> <p>Year/Quarter - Search by reconciliation year and reconciliation quarter.</p> <p>Submission Date - Search by submission date.</p> <p>Status - Search by transmission status.</p>
Order By: 2nd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Carrier ID - Search by carrier ID number.</p> <p>Name - Search by enrollee name.</p> <p>Year/Quarter - Search by reconciliation year and reconciliation quarter.</p> <p>Submission Date - Search by submission date.</p> <p>Status - Search by transmission status.</p>



Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Carrier ID - Search by carrier ID number.</p> <p>Name - Search by enrollee name.</p> <p>Year/Quarter - Search by reconciliation year and reconciliation quarter.</p> <p>Submission Date - Search by submission date.</p> <p>Status - Search by transmission status.</p>
Check box to create report without totals	<p><i>Optional</i></p> <p>Select this check box to omit totals from the report.</p>

6. Click the drop-down menu at the bottom of the page and select one of the following format options:
 - Display report
 - Save report as a spreadsheet
 - Save report as a text file
7. Click **Submit** to display the Carrier Enrollment Transmission report in the selected format.

OR

Click **Reset** to clear all data entered.

Figure 142: Carrier Enrollment Transmission Report

To return to the Carrier Enrollment Transmission (Report 6) page, close the report.



Field	Description
Carrier	<i>System generated</i> Displays the carrier ID code.
Name	<i>System generated</i> Displays the name of the carrier.
Year	<i>System generated</i> Displays the reconciliation year.
Quarter	<i>System generated</i> Displays the reconciliation quarter.
Date Due	<i>System generated</i> Displays the transmission due date (MMDDYYYY) for the reconciliation quarter.
Submission Date	<i>System generated</i> Displays the date (MMDDYYYY) the carrier enrollment data file was submitted for processing.
Status	<i>System generated</i> Displays 000 for an accepted transmission; otherwise, a carrier system code is displayed. It indicates the status of a carrier enrollment data transmission. For a list and descriptions of carrier system codes, see Carrier System Codes Table (on page 253).
Accepted	<i>System generated</i> Displays the number of transmissions that passed front-end edits and were accepted for processing. <u>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</u>
Rejected	<i>System generated</i> Displays the number of transmissions that did not pass front-end edits and were rejected. <u>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</u>



Not Received	<p><i>System generated</i></p> <p>Displays the number of transmissions that were expected but not received.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p>
Total	<p><i>System generated</i></p> <p>Displays the sum of transmission records displayed on the report.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p>

Viewing Enrollment Change Summary (Report 7)

The Enrollment Change Summary (Report 7) option on the Reports Selection page allows users to view the Enrollment Change Summary report. This report lists additions and changes in enrollment between carriers and enrollment codes when comparing one quarter to any prior quarter.

To View an Enrollment Change Summary Report:

1. Select the **Reports** tab at the top of the CLER Main Menu.

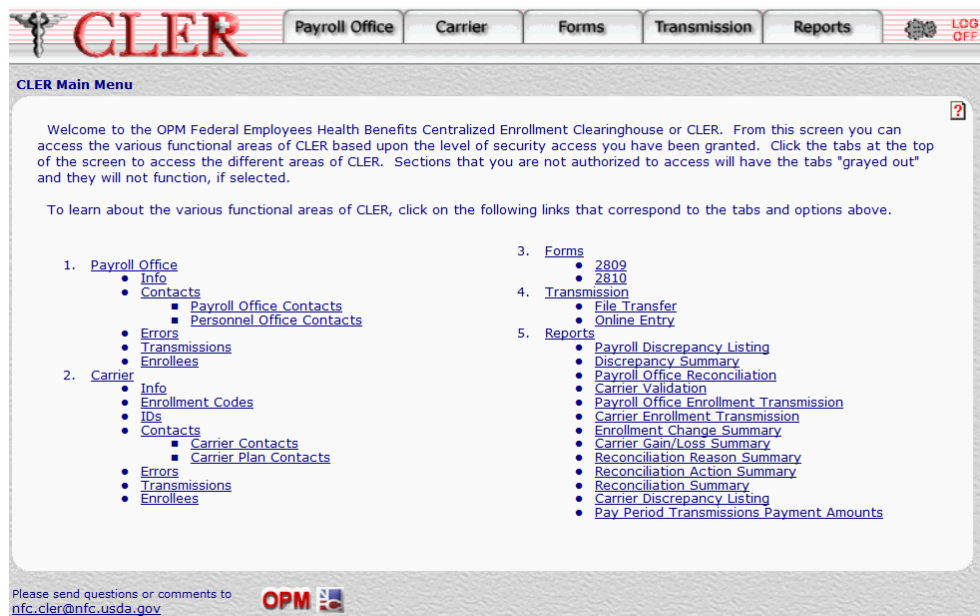


Figure 143: CLER Main Menu Page



- The Reports Selection page is displayed.

Figure 144: Reports Selection Page

- Click the drop-down menu on the Reports Selection page and select **Enrollment Change Summary**.
- Click **GO** to display the Enrollment Change Summary (Report 7) page.

Figure 145: Enrollment Change Summary (Report 7) Page

- Complete the fields on the Enrollment Change Summary (Report 7) page.

Field	Instruction/Description
Year* From	<i>Required, default</i> Select the year that begins the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.



Year* To	<i>Required, default</i> Select the year that ends the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Quarter* From	<i>Required, default</i> Select the quarter that begins the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Quarter* To	<i>Required, default</i> Select the quarter that ends the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Payroll Office ID*	<i>Required</i> Select the payroll office identification number from the drop-down menu.
Carrier	<i>Optional</i> Select the carrier code from the drop-down menu.
Enrollment Code	<i>Optional</i> Select the enrollment code from the drop-down list.
Check box to create report without totals	<i>Optional</i> Select this check box to omit totals from the report.

6. Click the drop-down menu at the bottom of the page and select one of the following format options:
 - Display the report
 - Save report as a spreadsheet
 - Save report as a text file
7. Click **Submit** to display the Enrollment Change Summary report in the selected format.



OR

Click **Reset** to clear all data entered.

Enrollment Change Summary							
Carrier	Code	From	To	Change		Enrollees	
		Qtr 3 2014	Qtr 3 2014	#	%	New/Add	Left/Drop
		0	0	0	0.0%	0	0
Total Records: 0							

Figure 146: Enrollment Change Summary Report Page

To return to the Enrollment Change Summary (Report 7) page, close the report.

Field	Description
Carrier	<i>System generated</i> Displays the carrier ID code.
Code	<i>System generated</i> Displays the enrollment code.
From (Quarter/Year)	<i>System generated</i> Displays the number of enrollees covered by the enrollment code displayed in the Code field during the selected quarter and year.
To (Quarter/Year)	<i>System generated</i> Displays the number of enrollees covered by the enrollment code displayed in the Code field during the selected quarter and year.
Change (#)	<i>System generated</i> Displays the change in the number of enrollment code changes from the prior quarter to the current quarter.
Change (%)	<i>System generated</i> Displays the change in percent of enrollment code changes from the prior quarter to the current quarter.
Enrollees (New/Add)	<i>System generated</i> Displays the number of new or added enrollees.



Enrollees (Left/Drop)	<p><i>System generated</i></p> <p>Displays the number of dropped enrollees.</p>
Total Records	<p><i>System generated</i></p> <p>Displays the total number of enrollee records displayed on the report.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p>

Viewing Carrier Gain/Loss Summary (Report 8)

The Carrier Gain/Loss Summary (Report 8) option on the Reports Selection page allows users to view the Carrier Gain/Loss Summary report. This report provides information regarding the movement of enrollees between carriers and plans (enrollment codes) when comparing one quarter to any prior quarter.

To View a Carrier Gain/Loss Summary Report:

1. Select the **Reports** tab at the top of the CLER Main Menu.

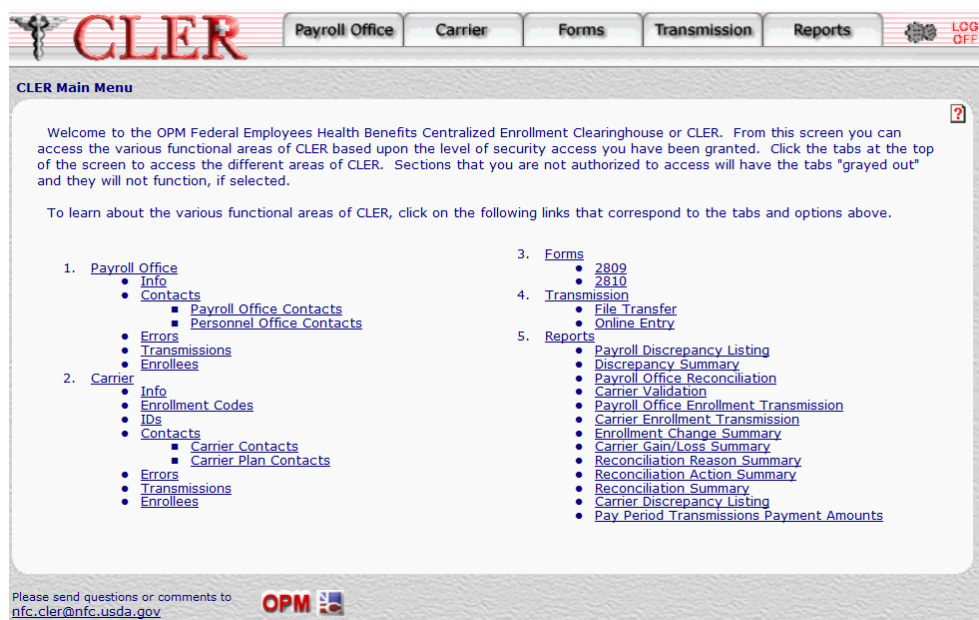


Figure 147: CLER Main Menu Page



- The Reports Selection page is displayed.

Figure 148: Reports Selection Page

- Click the drop-down menu on the Reports Selection page and select **Carrier Gain/Loss Summary**.
- Click **GO** to display the Carrier Gain/Loss Summary (Report 8) page.

Figure 149: Carrier Gain/Loss Summary (Report 8) Page

- Complete the fields on the Carrier Gain/Loss Summary (Report 8) page.

Field	Instruction/Description
Year* From	<i>Required, default</i> Select the year that begins the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.



Year* To	<p><i>Required, default</i></p> <p>Select the year that ends the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.</p>
Quarter* From	<p><i>Required, default</i></p> <p>Select the quarter that begins the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.</p>
Quarter* To	<p><i>Required, default</i></p> <p>Select the quarter that ends the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.</p>
Carrier*	<p><i>Required</i></p> <p>Select the carrier code from the drop-down menu.</p>
Enrollment Code	<p><i>Optional</i></p> <p>Select the enrollment code from the drop-down list.</p>
Payroll Office ID	<p><i>Required</i></p> <p>Select the payroll office identification number from the drop-down menu.</p>
Check box to create report without totals	<p><i>Optional</i></p> <p>Select this check box to omit totals from the report.</p>

6. Click the drop-down menu at the bottom of the page and select one of the following format options:
 - Display the report
 - Save report as a spreadsheet
 - Save report as a text file
7. Click **Submit** to display the Carrier Gain/Loss Summary report in the selected format.



OR

Click **Reset** to clear all data entered.

Carrier Gain/Loss Summary							
From: Qtr 3 2014		To: Qtr 3 2014		Enrollment Changes			
Carrier	Code	Carrier	Code	Added	%	Dropped	%
Total Records: 0				0	0.00%	0	100.00%

Figure 150: Carrier Gain/Loss Summary Report Page

To return to the Carrier Gain/Loss Summary (Report 8) page, close the report.

Field	Description
From: Quarter/Year Carrier	<i>System generated</i> Displays the carrier code.
From: Quarter/Year Code	<i>System generated</i> Displays the enrollment code.
To: Quarter/Year Carrier	<i>System generated</i> Displays the carrier code.
To: Quarter/Year Code	<i>System generated</i> Displays the enrollment code.
Enrollment Changes Added	<i>System generated</i> Displays the number of enrollment changes that were added.
Enrollment Changes %	<i>System generated</i> Displays the percent of enrollment changes that were added.
Enrollment Changes Dropped	<i>System generated</i> Displays the number of enrollment changes that were dropped.
Enrollment Changes %	<i>System generated</i> Displays percent of enrollment changes that were dropped.



Total Records	<p><i>System generated</i></p> <p>Displays the total number of enrollee records displayed on the report.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p>
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Viewing Reconciliation Reason Summary (Report 9)

The Reconciliation Reason Summary (Report 9) option on the Reports Selection page allows users to view the Reconciliation Reason Summary report. This report provides information regarding the cause of the discrepancies that were identified during the reconciliation process for a single quarter.

To View a Reconciliation Reason Summary Report:

1. Select the **Reports** tab at the top of the CLER Main Menu.

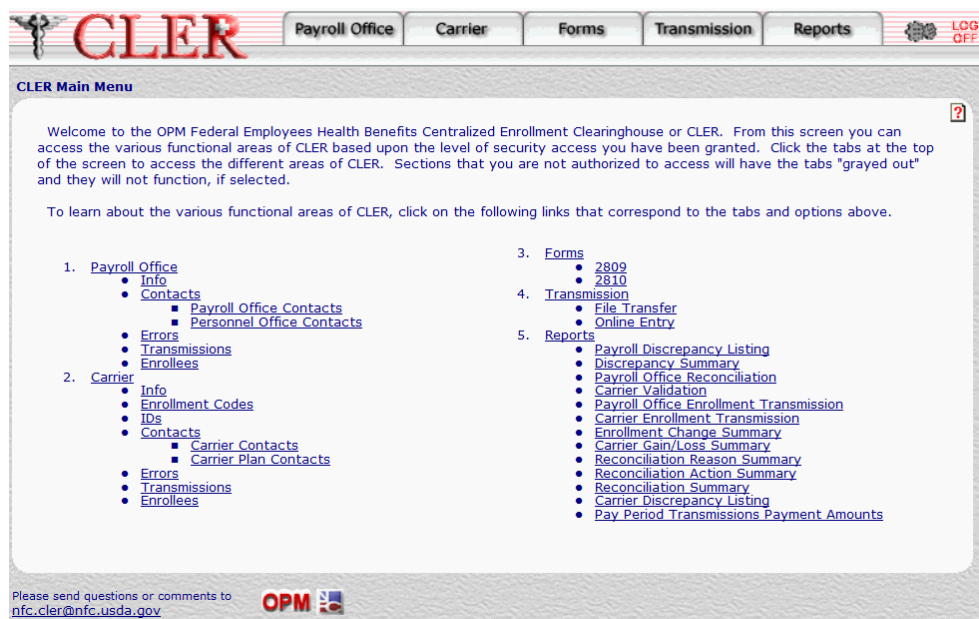


Figure 151: CLER Main Menu Page



2. The Reports Selection page is displayed.

CLER Payroll Office Carrier Forms Transmission Reports LOG OFF

Reports Selection 1. Payroll Discrepancy Listing GO

Select a report from the drop down list above and press the GO button to enter selection criteria for that report.

In this section, the following options may be selected above:

1. **Payroll Discrepancy Listing** - Provides a listing by Payroll enrollee of each discrepancy.
2. **Discrepancy Summary** - Allows comparison of discrepancies occurring in one quarter with those that occurred in any other quarter.
3. **Payroll Office Reconciliation** - Shows each enrollee that has a discrepancy and whether that discrepancy has been reconciled.
4. **Carrier Validation** - Shows each enrollee that has a discrepancy and if that discrepancy has been validated.
5. **Payroll Office Enrollment Transmission** - Shows the timeliness of the transmission of quarterly Payroll Office enrollment data.
6. **Carrier Enrollment Transmission** - Shows the timeliness of the transmission of quarterly Carrier data.
7. **Enrollment Change Summary** - Shows how enrollment changes occur between one quarter and any prior quarter.
8. **Carrier Gain/Loss Summary** - Shows how enrollment changes occur between one quarter and any prior quarter.
9. **Reconciliation Reason Summary** - Shows what caused the discrepancies that were uncovered during the reconciliation process for a single quarter.
10. **Reconciliation Action Summary** - Shows what had to be corrected during the reconciliation process for a single quarter.
11. **Reconciliation Summary** - Shows the progress that has been made to reconcile the discrepancies found in a single quarter.
12. **Carrier Discrepancy Listing** - Provides a listing by Carrier Id enrollee of each discrepancy.
13. **Pay Period Transmissions Payment Amounts** - Provides information from Payroll Offices relative to the amount of premiums collected for each completed pay period.

Figure 152: Reports Selection Page

3. Click the drop-down menu on the Reports Selection page and select **Reconciliation Reason Summary**.
4. Click **GO** to display the Reconciliation Reason Summary (Report 9) page.

CLER Payroll Office Carrier Forms Transmission Reports LOG OFF

Reports Selection 9. Reconciliation Reason Summary GO

9. Reconciliation Reason Summary

Enter selection criteria in the following fields, select the output option from the box at the bottom left and click the SUBMIT button to display the report or send it to a spreadsheet or text file on your computer. Reports may be printed by using the browser's print function. Fields marked with * are required. Leaving an entry blank will return all values for that field.

Year* Quarter* Carrier Enrollment Code Payroll Office ID

2014 3

Agency Personnel Office ID Reason Code

ex. AG90

Order By: 1st Carrier 2nd 3rd 4th 5th 6th

Check box to create report without totals: ☐

Display the report SUBMIT RESET

Figure 153: Reconciliation Reason Summary (Report 9) Page

5. Complete the fields on the Reconciliation Reason Summary (Report 9) page.



Field	Instruction/Description
Year*	<i>Required, default</i> Select the reconciliation year from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Quarter*	<i>Required, alphanumeric, 1 position</i> Enter the reconciliation quarter for the requested error statistics.
Carrier	<i>Optional</i> Select the carrier code from the drop-down menu.
Enrollment Code	<i>Optional</i> Select the enrollment code from the drop-down list.
Payroll Office ID	<i>Required</i> Select the payroll office identification number from the drop-down menu.
Agency	<i>Optional, alphanumeric, 4 positions</i> Enter the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).
Personnel Office ID	<i>Optional, alphanumeric, 4 positions</i> Enter the POI number.
Reason Code	<i>Optional</i> Select the reconciliation reason code from the drop-down menu. For a list and descriptions of these codes, see Reconciliation Reason Codes Table (on page 255).
Order By: 1st	<i>Optional, default</i> Defaults to the Carrier option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order. Agency - Search by Agency code. Carrier - Search by carrier code. Enrollment Code - Search by enrollment code. Payroll Office - Search by payroll office identification number. Pers. Office ID - Search by POI number. Reason Code - Search by reconciliation reason code.



Order By: 2nd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reason Code - Search by reconciliation reason code.</p>
Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reason Code - Search by reconciliation reason code.</p>
Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reason Code - Search by reconciliation reason code.</p>



Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reason Code - Search by reconciliation reason code.</p>
Order By: 6th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reason Code - Search by reconciliation reason code.</p>
Check box to create report without totals	<p><i>Optional</i></p> <p>Select this check box to omit totals from the report.</p>

6. Click the drop-down menu at the bottom of the page and select one of the following format options:
 - Display the report
 - Save report as a spreadsheet
 - Save report as a text file
7. Click **Submit** to display the Reconciliation Reason Summary report in the selected format.



OR

Click **Reset** to clear all data entered.

Figure 154: Reconciliation Reason Summary Report Page

To return to the Reconciliation Reason Summary (Report 9) page, close the report.

Field	Description
Payroll Office	<i>System generated</i> Displays the payroll office identification number.
Carrier	<i>System generated</i> Displays the carrier code.
Code	<i>System generated</i> Displays the enrollment code.
Agency	<i>System generated</i> Displays the Agency ID code. This code consists of the Department code and Agency code. <u>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Discrepancy Listing page.</u>
POI	<i>System generated</i> Displays the POI number. <u>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Discrepancy Listing page.</u>



Reason	<p><i>System generated</i></p> <p>Displays the reconciliation reason code. For a list and descriptions of reconciliation reason codes, see Reconciliation Reason Codes Table (on page 255).</p>
Total	<p><i>System generated</i></p> <p>Displays the number of specified reconciliation reason codes that meet the criteria entered on the Reconciliation Reason Summary page.</p>
Total Errors	<p><i>System generated</i></p> <p>Displays the sum of the numbers displayed in the Total field.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p>
Total Records	<p><i>System generated</i></p> <p>Displays the total number of records displayed on the report.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p>

Viewing Reconciliation Action Summary (Report 10)

The Reconciliation Action Summary (Report 10) option on the Reports Selection page allows users to view the Reconciliation Action Summary report. This report provides information regarding the action to be taken to correct the discrepancies identified during the reconciliation process for a single quarter.



To View a Reconciliation Action Summary Report:

1. Select the **Reports** tab at the top of the CLER Main Menu.

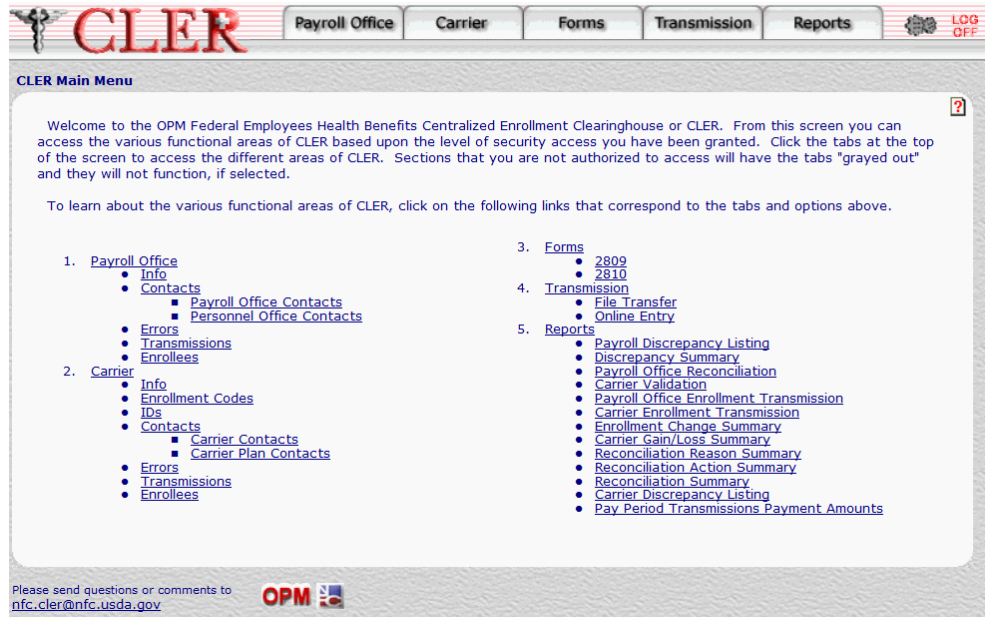


Figure 155: CLER Main Menu Page

2. The Reports Selection page is displayed.

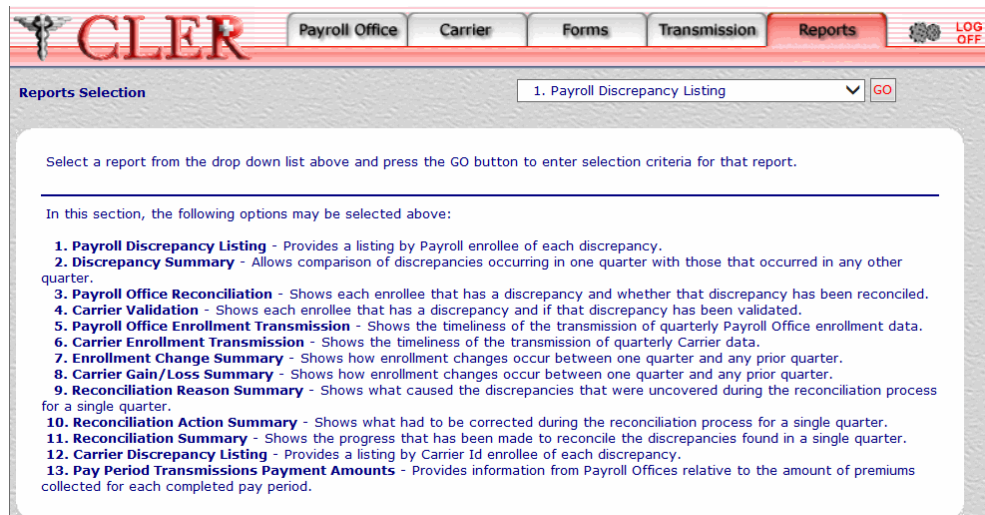


Figure 156: Reports Selection Page

3. Click the drop-down menu on the Reports Selection page and select **Reconciliation Action Summary**.



4. Click **GO** to display the Reconciliation Action Summary (Report 10) page.

The screenshot shows the CLER web interface. At the top, there's a navigation bar with tabs: Payroll Office, Carrier, Forms, Transmission, and Reports (which is highlighted). A 'LOG OFF' button is on the right. Below the navigation bar, there's a 'Reports Selection' section with a dropdown menu set to '10. Reconciliation Action Summary' and a 'GO' button. The main content area is titled '10. Reconciliation Action Summary' and contains instructions: 'Enter selection criteria in the following fields, select the output option from the box at the bottom left and click the SUBMIT button to display the report or send it to a spreadsheet or text file on your computer. Reports may be printed by using the browser's print function. Fields marked with * are required. Leaving an entry blank will return all values for that field.'

The form fields are as follows:

- Year***: A dropdown menu with '2014' selected.
- Quarter***: A dropdown menu with '3' selected.
- Carrier**: A dropdown menu.
- Enrollment Code**: A dropdown menu.
- Payroll Office ID**: A dropdown menu.
- Agency**: A text input field with the example 'ex. AG90' below it.
- Personnel Office ID**: A text input field.
- Action Code**: A dropdown menu.
- Order By:**: A section with six dropdown menus labeled 1st, 2nd, 3rd, 4th, 5th, and 6th. The 1st dropdown is set to 'Carrier'.
- Check box to create report without totals:** An unchecked checkbox.
- Display the report**: A dropdown menu.
- SUBMIT** and **RESET** buttons.

Figure 157: Reconciliation Action Summary (Report 10) Page

5. Complete the fields on the Reconciliation Action Summary (Report 10) page.

Field	Instruction/Description
Year*	<i>Required, default</i> Select the reconciliation year from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Quarter*	<i>Required default</i> Select the reconciliation quarter from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Carrier	<i>Optional</i> Select the carrier code from the drop-down menu.
Enrollment Code	<i>Optional</i> Select the enrollment code from the drop-down list.
Payroll Office ID	<i>Required</i> Select the payroll office identification number from the drop-down menu.



Agency	<i>Optional, alphanumeric, 4 positions</i> Enter the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).
Personnel Office ID	<i>Optional, alphanumeric, 4 positions</i> Enter the POI number.
Action Code	<i>Optional</i> Select the reconciliation action code from the drop-down menu. For a list and descriptions of these codes, see Reconciliation Action Codes Table (on page 258).
Order By: 1st	<i>Optional, default</i> Defaults to the Carrier option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order: Action Code - Search by reconciliation action code. Agency - Search by Agency code. Carrier - Search by carrier code. Enrollment Code - Search by enrollment code. Payroll Office - Search by payroll office identification number. Personnel Office ID - Search by POI number.
Order By: 2nd	<i>Optional</i> Select one of the following options from the drop-down menu to display the selected criteria in second sort search order: Action Code - Search by reconciliation action code. Agency - Search by Agency code. Carrier - Search by carrier code. Enrollment Code - Search by enrollment code. Payroll Office - Search by payroll office identification number. Personnel Office ID - Search by POI number.



Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Action Code - Search by reconciliation action code.</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Personnel Office ID - Search by POI number.</p>
Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p>Action Code - Search by reconciliation action code.</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Personnel Office ID - Search by POI number.</p>
Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p>Action Code - Search by reconciliation action code.</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Personnel Office ID - Search by POI number.</p>



Order By: 6th	<i>Optional</i> Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order: Action Code - Search by reconciliation action code. Agency - Search by Agency code. Carrier - Search by carrier code. Enrollment Code - Search by enrollment code. Payroll Office - Search by POI number. Personnel Office ID - Search by POI number.
Check box to create report without totals	<i>Optional</i> Select this check box to omit totals from the report.

6. Click the drop-down menu at the bottom of the page and select one of the following format options:
 - Display the report
 - Save report as a spreadsheet
 - Save report as a text file
7. Click **Submit** to display the Reconciliation Action Summary report in the selected format.

OR

Click **Reset** to clear all data entered.

Reconciliation Action Summary							
Payroll Office							
Payroll Office	Carrier	Code	Agency	POI	Action	Total	
Total Errors: 0							
Total Records: 0							

Figure 158: Reconciliation Action Summary Report Page

To return to the Reconciliation Action Summary (Report 10) page, close the report.



Field	Description
Payroll Office	<i>System generated</i> Displays the payroll office identification number.
Carrier	<i>System generated</i> Displays the carrier code.
Code	<i>System generated</i> Displays the enrollment code.
Agency	<p><i>System generated</i></p> <p>Displays the Agency ID code. This code consists of the Department code and Agency code.</p> <hr/> <p>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Discrepancy Listing page.</p>
POI	<p><i>System generated</i></p> <p>Displays the POI number.</p> <hr/> <p>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Discrepancy Listing page.</p>
Action	<p><i>System generated</i></p> <p>Displays the reconciliation action code. For a list and descriptions of reconciliation action codes, see Reconciliation Action Codes Table (on page 258).</p>
Total	<p><i>System generated</i></p> <p>Displays the number of specified reconciliation action codes that meet the criteria entered on the Reconciliation Action Summary page.</p>
Total Errors	<p><i>System generated</i></p> <p>Displays the sum of the numbers displayed in the Total field.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p>



Total Records	<i>System generated</i> Displays the total number of records displayed on the report. <hr/> Note: If the check box used to omit totals from a report is selected, this field is not displayed. <hr/>
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Viewing Reconciliation Summary (Report 11)

The Reconciliation Summary (Report 11) option on the Reports Selection page allows users to view the Reconciliation Summary report. This report provides information regarding the progress that has been made to reconcile the discrepancies found in a single quarter.

To View a Reconciliation Summary Report:

1. Select the **Reports** tab at the top of the CLER Main Menu.

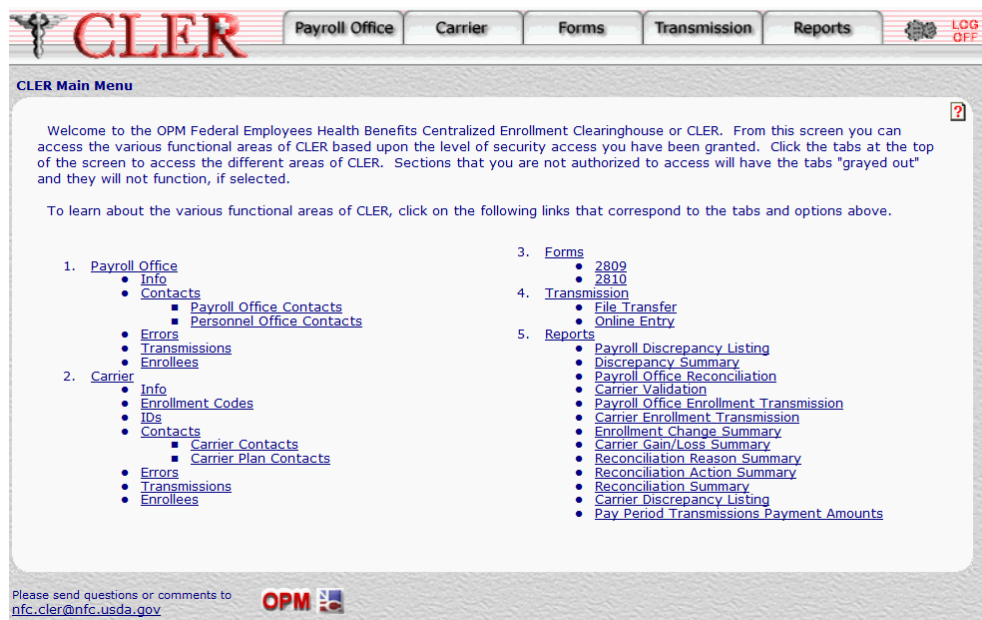


Figure 159: CLER Main Menu Page



2. The Reports Selection page is displayed.

Figure 160: Reports Selection Page

3. Click the drop-down menu on the Reports Selection page and select **Reconciliation Summary**.
4. Click **GO** to display the Reconciliation Summary (Report 11) page.

Figure 161: Reconciliation Summary (Report 11) Page

5. Complete the fields on the Reconciliation Summary (Report 11) page.



Field	Instruction/Description
Payroll Office ID*	<i>Required</i> Select the payroll office identification number from the drop-down menu.
Year*	<i>Required, default</i> Select the reconciliation year from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Quarter*	<i>Required default</i> Select the reconciliation quarter from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Reconciliation Date From	<i>Optional</i> This is the date that begins the range of reconciliation dates. To select this date, select the month from the first drop-down menu, select the day from the second drop-down menu, and select the year from the third drop-down menu.
Reconciliation Date To	<i>Optional</i> This is the date that ends the range of reconciliation dates. To select this date, select the month from the first drop-down menu, select the day from the second drop-down menu; and select the year from the third drop-down menu.
Agency	<i>Optional, alphanumeric, 4 positions</i> Enter the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).
Personnel Office ID	<i>Optional, alphanumeric, 4 positions</i> Enter the POI number.
Carrier	<i>Optional</i> Select the carrier code from the drop-down menu.
Enrollment Code	<i>Optional</i> Select the enrollment code from the drop-down list.



Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Carrier option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Personnel Office ID - Search by POI number.</p>
Order By: 2nd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Pers. Office ID - Search by POI number.</p>
Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Pers. Office ID - Search by POI number.</p>
Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Pers. Office ID - Search by POI number.</p>
Check box to create report without totals	<p><i>Optional</i></p> <p>Select this check box to omit totals from the report.</p>

6. Click the drop-down menu at the bottom of the page and select one of the following format options:

- Display the report



Enrollees	<p><i>System generated</i></p> <p>Displays the number of enrollee records that meet the criteria entered on the Reconciliation Summary page.</p>
Match	<p><i>System generated</i></p> <p>Displays the number of matching records that meet the criteria entered on the Reconciliation Summary page.</p>
%	<p><i>System generated</i></p> <p>Displays the percentage of matching records to enrollee records.</p>
#	<p><i>System generated</i></p> <p>Displays the number of discrepancies.</p>
Recon	<p>Displays the number of reconciled discrepancies.</p>
%	<p><i>System generated</i></p> <p>Displays the percentage of reconciled discrepancies to reported discrepancies.</p>
Unrecon	<p><i>System generated</i></p> <p>Displays the number of unreconciled discrepancies.</p>
Validated	<p><i>System generated</i></p> <p>Displays the number of discrepancies/reconciliation actions that were validated by the carrier.</p>
%	<p><i>System generated</i></p> <p>Displays the percentage of discrepancies/reconciliation actions validated to total corrective actions.</p>
Unvalidated	<p><i>System generated</i></p> <p>Displays the number of discrepancies/reconciliation actions that were not validated by the carrier.</p>
Code-Total	<p><i>System generated</i></p> <p>Displays the sum of records by enrollment code.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p> <hr/>



Carrier-Total	<i>System generated</i> Displays the sum of records by carrier. <hr/> Note: If the check box used to omit totals from a report is selected, this field is not displayed. <hr/>
Grand-Total	<i>System generated</i> Displays the sum of records by enrollment code and carrier. <hr/> Note: If the check box used to omit totals from a report is selected, this field is not displayed. <hr/>

Viewing Carrier Discrepancy Listing (Report 12)

The Carrier Discrepancy Listing (Report 12) option on the Reports Selection page allows users to view the Carrier Discrepancy Listing report. This report provides a listing by carrier ID code of carrier and payroll office enrollee records that match, as well as records marked with carrier warning and discrepancy codes.

To View a Carrier Discrepancy Listing Report:

1. Select the **Reports** tab at the top of the CLER Main Menu.

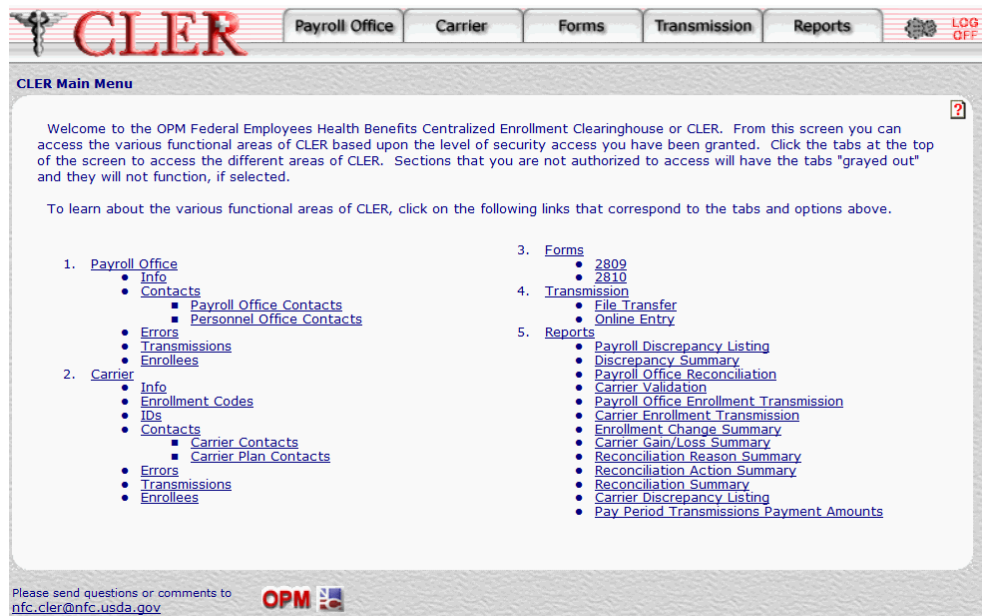


Figure 163: CLER Main Menu Page



2. The Reports Selection page is displayed.

Figure 164: Reports Selection Page

3. Click the drop-down menu on the Reports Selection page and select **Carrier Discrepancy Listing**.
4. Click **GO** to display the Carrier Discrepancy Listing (Report 12) page.

Figure 165: Carrier Discrepancy Listing Page

5. Complete the fields on the Carrier Discrepancy Listing (Report 12) page.



Field	Instruction/Description
Carrier ID*	<i>Required, default</i> Select your organization's carrier ID code from the drop-down menu. If no code is selected, this field automatically defaults to your organization's carrier ID code.
Year*	<i>Required, default</i> Select the reconciliation year from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
Quarter*	<i>Required default</i> Select the reconciliation quarter from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
Fail Count From	<i>Optional, numeric, 3 positions maximum.</i> Enter a specific fail count number to search for enrollee records by a specific fail count number, then proceed to the To field. OR Enter the number that starts the range of fail count numbers to search for enrollee records by a range of fail count numbers, then proceed to the To field.
Fail Count To	<i>Optional, numeric, 3 positions maximum</i> Entered the number that was entered in the From field to search enrollee records by a specific fail count number. OR Enter the number that ends the range of fail count numbers to search for enrollee records by a range of fail count numbers.
SSN - From	<i>Optional, alphanumeric, 9 positions</i> To search for a specific enrollee record by SSN, enter the SSN and skip the To field. To search for a range of enrollee records by a range of SSNs, enter the SSN that starts the range, then proceed to the To field. <hr/> Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page. <hr/>



Field	Instruction/Description
SSN - To	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a range of enrollee records by a range of SSNs, enter the SSN that ends the range; otherwise, leave blank.</p> <hr/> <p>Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p>
Payroll Office ID	<p><i>Required</i></p> <p>Select the payroll office identification number from the drop-down menu.</p>
Enrollment Code	<p><i>Optional</i></p> <p>Select the enrollment code from the drop-down list.</p>
Error Code	<p><i>Optional</i></p> <p>Select the applicable error code from the drop-down menu. For a list and descriptions of error codes, see Discrepancy Codes Table (on page 251).</p>
Warning Code	<p><i>Optional</i></p> <p>Select the warning code from the drop-down menu. Refer to the Warning Codes Table (on page 252) for a list and descriptions of these codes.</p>
Display	<p><i>Optional, default</i></p> <p>Allows users to display search results by the options listed below. If no display option is selected, this field automatically defaults to the All option. To choose a display option, select the radio button next to one of the following values:</p> <p>All - Displays all records related to the search criteria.</p> <p>Unreconciled - Displays all records with unreconciled discrepancies related to the search criteria.</p> <p>Errors - Displays all records with errors related to the search criteria.</p> <p>Warnings - Displays all records with warnings related to the search criteria.</p> <p>Reconciled - Displays all records with reconciled discrepancies related to the search criteria.</p> <p>Matches - Displays all records with matches related to the search criteria.</p> <p>Not Validated - Displays records related to the search criteria that have not been validated.</p>



Field	Instruction/Description
Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Name option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Payroll ID - Search by payroll office identification number.</p>
Order By: 2nd	<p><i>Optional, default</i></p> <p>Defaults to the SSNO option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Payroll ID - Search by payroll office identification number.</p>
Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Payroll ID - Search by payroll office identification number.</p>



Field	Instruction/Description
Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Payroll ID - Search by payroll office identification number.</p>
Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Payroll ID - Search by payroll office identification number.</p>
Order By: 6th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Payroll ID - Search by payroll office identification number.</p>
Check box to create report without totals	<p><i>Optional</i></p> <p>Select this check box to omit totals from the report.</p>

6. Click the drop-down menu at the bottom of the page and select one of the following format options:
 - Display the report
 - Save report as a spreadsheet
 - Save report as a text file



7. Click **Submit** to display the Carrier Discrepancy Listing report in the selected format.

OR

Click **Reset** to clear all data entered.

Carrier Discrepancy Listing

Carrier					Payroll Office				
SSN	Name	Code	Eff. Date	Payroll Id	Name	Code	Eff. Date	Discrepancy	Fail Count

Errors: 0
Warnings: 0
Total Records: 0

Figure 166: Carrier Discrepancy Listing Report Page

To return to the Carrier Discrepancy Listing (Report 12) page, close the report.

Field	Description
Carrier	<i>System generated</i> Displays the carrier ID code.
SSN	<i>System generated</i> Displays the enrollee's SSN.
Name	<i>System generated</i> Displays the enrollee's name submitted by the payroll office/carrier.
Code	<i>System generated</i> Displays the enrollment code submitted by the payroll office/carrier.
Eff. Date	<i>System generated</i> Displays the effective date (MM/DD/YYYY) submitted by the payroll office/carrier.
Payroll ID	<i>System generated</i> Displays the payroll office identification number.
Payroll Office	<i>System generated</i> Displays the payroll office identification number.



Field	Description
Name	<i>System generated</i> Displays the enrollee's name submitted by the payroll office/carrier.
Code	<i>System generated</i> Displays the enrollment code submitted by the payroll office/carrier.
Eff. Date	<i>System generated</i> Displays the effective date (MM/DD/YYYY) submitted by the payroll office/carrier.
Discrepancy	<i>System generated</i> Displays the error or warning code generated by CLER. For lists and descriptions of error and warning codes, see Discrepancy Codes Table (on page 251) and Warning Codes Table (on page 252).
Fail Count	<i>System generated</i> Displays the number of times the initial discrepancy has been identified and reported.
Errors	<i>System generated</i> Displays the sum of error codes displayed in the Discrepancy field. <u>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</u>
Warnings	<i>System generated</i> Displays the sum of warning codes displayed in the Discrepancy field. <u>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</u>
Total Records	<i>System generated</i> Displays the total number of enrollee records displayed on the report. <u>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</u>



Viewing Pay Period Transmissions Payment Amounts (Report 13)

The Pay Period Transmissions Payment Amounts (Report 13) option on the Reports Selection page allows FEHB carriers to see a grand total of all premiums collected or payments amount for enrollees by the payroll office.

To View a Pay Period Transmissions Payment Amount Report:

1. Select the **Reports** tab at the top of the CLER Main Menu.

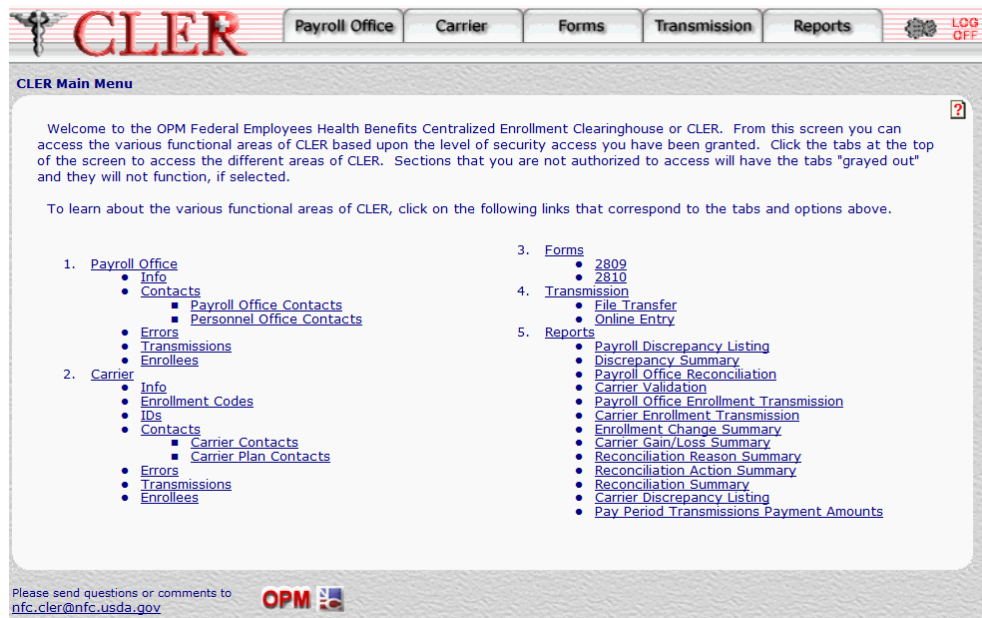


Figure 167: CLER Main Menu Page

2. The Reports Selection page is displayed.

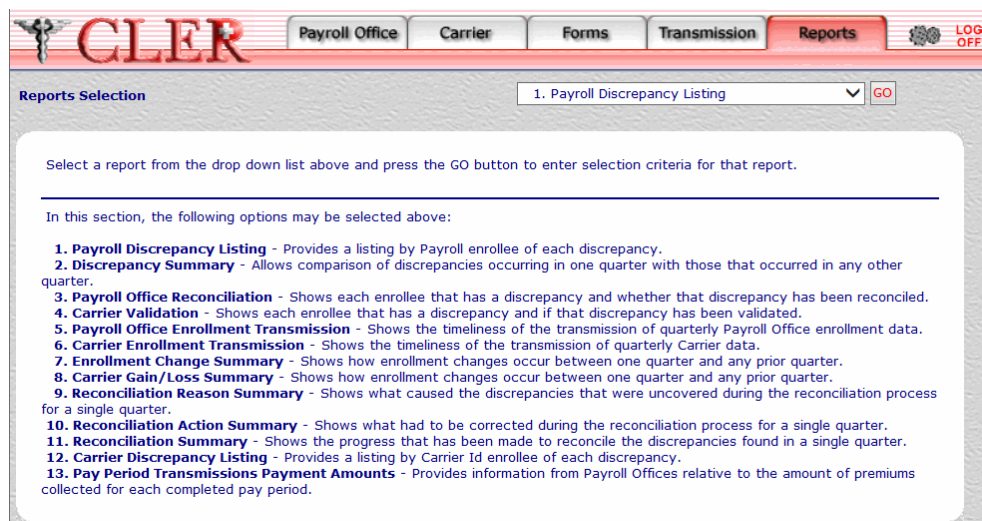


Figure 168: Reports Selection Page



- Click the drop-down menu on the Reports Selection page and select **Pay Period Transmissions Payment Amounts**.
- Click **GO** to display the Pay Period Transmission Payment Amounts (Report 13) page.

Figure 169: Pay Period Transmissions Payment Amounts Page

- Complete the fields on the Pay Period Transmission Payment Amounts (Report 13) page.

Field	Instruction/Description
Payroll Office ID*	<i>Required</i> Select the payroll office identification number from the drop-down menu.
Carrier ID*	<i>Required</i> Select the carrier ID number from the drop-down menu.
As of Date* From	<i>Required</i> Select the from pay period from the drop-down menu.
As of Date* To	<i>Required</i> Select the to pay period from the drop-down menu.
Pay Cycle	<i>Required</i> Select the payroll office pay cycle from the drop-down menu. B - Biweekly M - Monthly O - Other
Enrollment Code	<i>Optional</i> Select the enrollment code from the drop-down list.



Field	Instruction/Description
Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Carrier option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Carrier - Search by carrier.</p> <p>Pay Cycle - Search by pay cycle.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>As of Date - Search by as of date.</p>
Order By: 2nd	<p><i>Optional, default</i></p> <p>This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Carrier - Search by carrier.</p> <p>Pay Cycle - Search by pay cycle.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>As of Date - Search by as of date.</p>
Order By: 3rd	<p><i>Optional, default</i></p> <p>This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Carrier - Search by carrier.</p> <p>Pay Cycle - Search by pay cycle.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>As of Date - Search by as of date.</p>
Order By: 4th	<p><i>Optional, default</i></p> <p>This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in fourth search order:</p> <p>Carrier - Search by carrier.</p> <p>Pay Cycle - Search by pay cycle.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>As of Date - Search by as of date.</p>



Field	Instruction/Description
Order By: 5th	<i>Optional, default</i> This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in fifth search order: Carrier - Search by carrier. Pay Cycle - Search by pay cycle. Enrollment Code - Search by enrollment code. As of Date - Search by as of date.
Display Total Payment Amounts	<i>Optional, default</i> Defaults to the Display Total Payment Amounts menu option, which displays the total payment amounts. To display the payment amounts for enrollees, select the radio button next to the menu option Display Payment Amounts for Enrollees .

6. Click the drop-down menu at the bottom of the page and select one of the following format options:
 - Display the report
 - Save report as a spreadsheet
 - Save report as a text file
7. Click **Submit** to display the Carrier Discrepancy Listing report in the selected format.

OR

Click **Reset** to clear all data entered.



CLER Reference Tables

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Discrepancy Codes Table

A discrepancy code indicates an error occurred during the edit process. A record that has no discrepancies is considered reconciled. The table below lists discrepancy codes for CLER.

Code	Description	Explanation
101	Invalid Payroll Office ID Number On Payroll Office Record	NFC will investigate these and determine which payroll office is responsible for the record.
102	Invalid Payroll Office ID Number On Carrier Record	NFC will investigate these and determine which payroll office is responsible for the record.
120	Invalid/Missing Enrollment Code On Payroll Office Record	The enrollment code is for an invalid plan or option or it is missing.
121	Invalid/Missing Enrollment Code On Carrier Record	The enrollment code is for an invalid plan or option or it is missing.
140	Missing Enrollee ID Number On Payroll Office Record	The payroll office record did not contain a value for Enrollee SSN, Alternate SSN, Pseudo SSN, or Other Payroll Office ID.
141	Missing Enrollee ID Number On Carrier Record	The carrier record did not contain a value for Enrollee SSN, Alternate SSN, Pseudo SSN, or Other Payroll Office ID.
142	Missing Last Name On Payroll Office Record	The payroll office record did not contain the last name of the enrollee.
143	Missing Last Name On Carrier Record	The carrier record did not contain the last name of the enrollee.



Code	Description	Explanation
160	Enrollee On Carrier Record But No Payroll Office Record Found	The carrier reported this enrollee as being under your payroll office but your office reported no record for this enrollee.
161	Enrollee On Carrier Record But Reported Under Different Payroll Office	The enrollee is reported on your payroll office records and a matching carrier record was found for this enrollee, but the carrier record lists the enrollee under a different payroll office.
162	Enrollee Reported On Carrier Record Under Pay ID, But Found In Another Carr. ID	Enrollee is reported on a carrier record under the Carrier ID for the enrollment plan you submitted. However, enrollee record also found on a different Carrier ID.
163	Enrollee On Your Payroll Office Record, But No Carrier Record Found	The payroll office lists this enrollee as having coverage, but there is no corresponding carrier record.
164	Enrollee On Payroll Office And Carrier Records But Enrollment Codes Do Not Match	The enrollee is on a payroll office record and a matching carrier record was found. The enrollment codes of the two records, however, do not match.
165	Enrollee On Multiple Payroll Office Records - Reported To Each Payroll Office	This enrollee was included on more than one payroll office record. This situation usually happens when the enrollee is transferring jobs from one Agency to another. Payroll offices that report having this enrollee will receive this error message and should contact the other(s) to resolve this discrepancy. Also, payroll offices that service more than one Agency may have more than one record for an employee. These records will be reported to the servicing payroll office.
166	Enrollee On Multiple Carrier Records	This enrollee was included in the files of one or more carriers. Payroll offices specified in the carrier records will receive this error message and should contact each other to resolve this situation.
167	Enrollee ID On Payroll Office More Than Once	Same enrollee on the same payroll office record more than once.

Warning Codes Table

A warning code indicates that there is a certain condition that was flagged by CLER during the reconciliation process that is not considered a discrepancy error. Agencies, at their discretion, may correct records flagged with these warnings, but the presence of warnings, by themselves, do not make a record unreconciled. The table below lists warning codes for CLER.



Code	Description	Explanation
201	Enrollees Name Does Not Match	<p>For those Agencies that have separate fields for the first, middle, and last name: the first and last name fields of the payroll office's record will be matched to the carrier's record, and, if they are different, there will be a warning.</p> <p>For those Agencies that have one field for the first, middle, and last name: the last name and first name of the carrier record will be compared with the equal number of characters of the last name field of the payroll office record. If they do not match, then there will be a warning.</p>
202	Withholdings/Contribution Amount Missing Or Incorrect	<p>The amount of withholdings/contributions does not match the standard expected amount or is missing entirely. Some situations that may result in this warning include:</p> <p>Enrollee transferred from one payroll office to another within a single pay period.</p> <p>Enrollee did not contribute any money that particular pay period.</p> <p>Enrollee record shows an adjustment of previously reported premium amounts.</p>
203	Invalid Submitting Office Number	Submitting office number on payroll office enrollee does not match any payroll office personnel office identifier contact record.

Carrier System Codes Table

A carrier system code indicates the status of a carrier enrollment data transmission. The following table lists carrier system codes for CLER.

Code	Description	Explanation
401	Invalid As-Of Date	Invalid Gregorian date in the As-Of-Date field on the header record. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
402	The Footer Record Count Not Equal To Detail Count	The Record Count listed in the FOOTER record is not equal to the actual count produced from the program. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.



Code	Description	Explanation
403	Error Threshold Exceeded	The number or percentage of errors exceeded the allowed threshold or NO threshold has been set. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
404	No Footer Record	The Footer record was left off the transmission. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
405	Invalid Carrier ID On Footer Record	The Carrier ID listed on the Footer record does not match the Carrier ID on the Header record. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
406	Invalid Carrier ID On Header Record	The Carrier ID on the Header record is invalid or not active during this time period. The transmission will be rejected and no table will be updated. If this is the initial transmission, the processing code will need to be an I or space (for Initial transmission) when the transmission is resubmitted.
407	Invalid Reconciliation Year And/Or Quarter	The Reconciliation Year and/or Quarter does not match any on the Schedule Table. The transmission will be rejected and no table will be updated. If this is the initial transmission, the processing code will need to be an I or space (for Initial transmission) when the transmission is resubmitted.
408	Invalid Processing Code	Either the Processing Code was Invalid or used incorrectly for the type of transmission. The transmission will be rejected and no table will be updated. If this is the initial transmission, the processing code will need to be an I or space (for Initial transmission) when the transmission is resubmitted.
409	Carrier Transmission Has Been Replaced	The carrier transmission has been replaced by another transmission for the applicable year and quarter.



Code	Description	Explanation
410	Invalid Submission Date	Invalid Gregorian date in the Submission date field on the header record. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.

Reconciliation Reason Codes Table

Reconciliation reason codes are used by Agencies to explain the cause of a discrepancy. After an Agency researches a discrepancy, it will enter one of the following codes into CLER to describe the reason the discrepancy occurred:

Code	Description	Explanation
501	Payroll/Personnel Office Did Not Process 2809 Or 2810	Use this code when the 2809, 2810, or Employee Express transaction was not received or not processed by the payroll office. Once the payroll/personnel office has processed the change, it needs to be transmitted to the carrier.
502	Payroll/Personnel Office Did Not Process 2809 Or 2810 Correctly	Use this code when the 2809, 2810, or Employee Express transaction was created but was either entered into the system incorrectly or was not properly processed by the payroll/personnel office. Once the payroll/personnel office has processed the change, it needs to be transmitted to the carrier.
520	Carrier Did Not Process 2809 Or 2810	Use this code when the 2809, 2810, or Employee Express transaction was either not received or not processed by the carrier. The payroll/personnel office should then use CLER to create a 2809 or 2810 transaction that will be sent to the carrier. The 2809 or 2810 may be faxed or mailed to the carrier in lieu of using CLER. The 2809 or 2810 that is provided to the carrier is a reissue of the initial form.
521	Carrier Did Not Process 2809 Or 2810 Correctly	Use this code when the 2809, 2810, or Employee Express transaction was not received or processed correctly by the carrier. The payroll/personnel office should then use CLER to create a 2809 or 2810 transaction that will be sent to the carrier. The 2809 or 2810 may be faxed or mailed to the carrier in lieu of using CLER. The 2809 or 2810 that is provided to the carrier is a reissue of the initial form.



Code	Description	Explanation
522	Carrier Enrolled Person Without Payroll/Personnel Office Authorization	The enrollee sent his/her information directly to the carrier (bypassing the personnel office). The carrier should never enroll an individual unless it receives the information from an authorized source, i.e., the payroll/personnel office or Employee Express. In the unlikely event this does happen, the payroll office should work with the personnel office, enrollee, and carrier to get proper enrollment paperwork that it can use to update the payroll office system.
523	Carrier Changed Plan - Enrollee Out Of Service Area	The enrollee requested a plan that is not allowed for the area in which he/she lives and the carrier automatically switched the enrollee to the correct plan. This should never happen as the carrier should never make enrollment changes unless it receives the information from an authorized source, i.e., the payroll/personnel office or Employee Express. In the unlikely event it does happen, the payroll office should work with the personnel office, enrollee, and carrier to get proper enrollment paperwork that it can use to update the payroll office system.
524	Carrier Changed Option Without Payroll/Personnel Office Authorization	The enrollee sent his/her information directly to the carrier (bypassing the personnel office) or the carrier automatically changed the option when the enrollee got married or when the last dependent turned 22 years of age. The carrier should never make enrollment changes unless it receives the information from an authorized source, i.e., the payroll/personnel office or Employee Express. In the unlikely event it does happen, the payroll office should work with the personnel office, enrollee, and carrier to get the proper enrollment paperwork that they can use to update the payroll office system.
525	Carrier Rejected SF 2809 - Enrollee Out Of Service Area	The enrollee requested a plan that is not allowed for the area in which he/she lives so the carrier rejected the enrollment or enrollment change. The payroll office should work with the personnel office and enrollee to get the proper paperwork so that it can update its system and send the enrollment or enrollment change to the carrier.



Code	Description	Explanation
526	Carrier Terminated Coverage Due To Death Of Enrollee	This should never happen as the carrier should never make enrollment changes unless it receives the information from an authorized source, i.e., the payroll/personnel office or Employee Express. In the unlikely event it does happen, the payroll office should work with the personnel office, enrollee, and carrier to get proper enrollment paperwork that they can use to update the payroll office system.
540	Enrollee In Unpaid Status - No Deductions For Pay Period	Some payroll offices only send in records for those enrollees for whom premiums were paid (either by deductions from enrollee pay or by contribution from the enrollees Agency). If an enrollee did not pay that pay period but was truly enrolled, then use this code to indicate why the discrepancy occurred. For this situation, no change would be required to either the payroll office's records or the carrier's records.
541	Enrollee Separation Not Submitted Timely	Use this code if the enrollee's separation paperwork is not received promptly by the payroll office and is therefore still reported by the payroll/personnel office (and possibly the carrier) as being enrolled.
542	Enrollee Reported Under Two Payroll Offices - Transfer During Pay Period	Use this code if two different payroll offices or Agencies report an enrollee because that enrollee was transferring-in during the reconciliation pay period. For this situation, no corrective action is required as both payroll offices and Agencies properly reported this enrollee to CLER.
550	Transfer In Not Processed Timely By Gaining Payroll Office	Use this code when the gaining payroll office has not processed the transfer in for the enrollee's prior payroll office. Contact the other payroll office so that it can obtain the proper paperwork and update its records.
551	Transfer In Not Processed Timely By OWCP	Use this code if the carrier reports an enrollee as belonging to your payroll office even though that enrollee should be handled by the Office of Workers Compensation Program (OWCP).
552	Transfer In Not Processed Timely By Gaining Payroll Office	Use this code if the carrier reports a retiree as still belonging to the enrollee's prior payroll office. A transfer in to correct both records needs to be processed.



Code	Description	Explanation
560	Retiree Transfer In Not Processed Timely	This code should be used when the discrepancy is due solely to the difference in extraction date between the payroll office and carriers (refer to the Payroll Office Enrollment File Layout Specifications for more details). For example, the carriers extract their data on the first of the month and a payroll office that pays biweekly might extract data on the fifth. Between the first and fifth of the month, some enrollees may have dropped or changed coverage while others may have enrolled for the first time.
570	Pseudo SSN Used	Enrollees are not required to provide their SSN to the carrier so some enrollees provide a fake or pseudo SSN. This can result in a discrepancy unless the payroll office system also sends the pseudo SSN to CLER so that records can be properly matched. Use this code whenever the discrepancy is due to a pseudo SSN.
580	Other - See Comments	Use this code when no other code is suitable. Comments must be supplied to explain the reconciliation reason.
590	OPM USE ONLY - Multiple Accounts with Shared CSA/CSF number	Civil Service Retirement Claim (CSA/CSF) number shared by more than one annuitant/survivor.
591	OPM USE ONLY - Enrollee Dropped Due to Death/Suspend Status - PO to investigate	Enrollment is dropped due to death or because the case is in suspend status - Payroll office will investigate these and notify carrier of the termination effective date.

Reconciliation Action Codes Table

Reconciliation action codes are used by Agencies to describe which system(s) needs to be updated as part of resolving a discrepancy. After an Agency researches a discrepancy, it will enter one of the codes listed below in CLER.

Code	Description	Explanation
601	Payroll/Personnel Office Correction Required - Processed Through Payroll System	Use this code when only the payroll office's system needs to be updated. At its discretion, the payroll office may send the carrier a confirmation of the fact that the payroll office records were updated.



Code	Description	Explanation
610	Carrier Correction Required - Submitted By Payroll/Personnel Office Through CLER	Use this code when only the carrier's system needs to be changed and the carrier was informed of those changes through the use of CLER's 2809 or 2810 online forms.
611	Carrier Correction Required - Submitted By Payroll/Personnel Office By Fax	Use this code when only the carrier system needs to be changed and the payroll/personnel office informed the carrier via a fax of the SF 2809 or SF 2810 form.
612	Carrier Correction Required - Submitted By Payroll/Personnel Office By Mail	Use this code when only the carrier system needs to be changed and the payroll/personnel office informed the carrier via a copy of the SF 2809 or SF 2810 through the mail.
620	Correction Required By Carrier And Payroll Office - Processed Through Payroll System	Use this code when both the payroll office and the carrier need to correct their records.
630	Action Required By Another Payroll/Personnel Office	Use this code when the enrollee is no longer the responsibility of your payroll office but has, instead, transferred to another payroll office.
640	No Action Required	Use this code when neither the payroll office nor carrier needs to make changes to their records. For example, this code would be used in conjunction with reconciliation reason codes: 540 Enrollee In Unpaid Status - No Deductions for Pay Period. 542 Enrollee Reported Under Two Payroll Offices - Transfer During The Pay Period. 560 Discrepancy Due to Timing.

Carrier Corrective Action Response Codes Table

Carrier corrective action response codes are entered into CLER by carriers to record agreement with and completion of the requested correction specified by the Agency office, or disagreement with the corrective action specified by the Agency office. The following table lists the carrier corrective action response codes for CLER.

Code	Description	Explanation
701	Agree And Correction Processed Successfully	The carrier would enter this code when they agree with the change requested by the payroll office and have successfully updated its records.



Code	Description	Explanation
721	Disagree - Enrollee Out Of Servicing Area	The carrier is unable to process the requested change because they do not offer that plan for the area where the individual lives.
722	Disagree - Last Dependent Reached Age 22	The carrier cannot change the individual to a family option because the enrollee no longer has dependents under age 22.
723	Disagree - Enrollment Terminated Due To Non-Payment of Membership Fees	The carrier cannot enroll or update enrollment for this individual because the enrollment has been terminated due to the non-payment of dues.
724	Other - See Comments	Use this code when no other code is suitable. Comments must be supplied to explain the Corrective Action.

State, U.S. Territory, and Overseas Military Abbreviations Table

The following table lists valid state, U.S. territory, and overseas military abbreviations for CLER.

Abbreviation	Description
AA	Armed Forces Americas (except Canada and United States of America)
AE	Armed Forces Africa, Canada, Europe, and Middle East
AK	Alaska
AL	Alabama
AP	Armed Forces Pacific
AR	Arkansas
AS	American Samoa
AZ	Arizona
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia
DE	Delaware



Abbreviation	Description
FL	Florida
FM	Federated States of Micronesia
GA	Georgia
GU	Guam
HI	Hawaii
IA	Iowa
ID	Idaho
IL	Illinois
IN	Indiana
KS	Kansas
KY	Kentucky
LA	Louisiana
MA	Massachusetts
MD	Maryland
ME	Maine
MH	Marshall Islands
MI	Michigan
MN	Minnesota
MO	Missouri
MP	Northern Mariana Islands
MS	Mississippi
MT	Montana
NC	North Carolina
ND	North Dakota
NE	Nebraska
NH	New Hampshire



Abbreviation	Description
NJ	New Jersey
NM	New Mexico
NV	Nevada
NY	New York
OH	Ohio
OK	Oklahoma
OR	Oregon
PA	Pennsylvania
PR	Puerto Rico
PW	Palau
RI	Rhode Island
SC	South Carolina
SD	South Dakota
TN	Tennessee
TX	Texas
UT	Utah
VA	Virginia
VI	Virgin Islands
VT	Vermont
WA	Washington
WI	Wisconsin
WV	West Virginia
WY	Wyoming

Country Codes Table

The following table lists valid country codes for CLER.



Country	Code
Afghanistan	AF
Albania	AL
Algeria	AG
American Samoa	AQ
Andorra	AN
Angola	AO
Anguilla	AV
Antarctica	AY
Antigua and Barbuda	AC
Argentina	AR
Armenia	AM
Aruba	AA
Ashmore and Cartier Islands	AT
Australia	AS
Austria	AU
Azerbaijan	AJ
Bahamas, The	BF
Bahrain	BA
Baker Island	FQ
Bangladesh	BG
Barbados	BB
Bassas da India	BS
Belarus	BO
Belgium	BE
Belize	BH
Benin	BN



Country	Code
Bermuda	BD
Bhutan	BT
Bolivia	BL
Bosnia and Herzegovina	BK
Botswana	BC
Bouvet Island	BV
Brazil	BR
British Indian Ocean Territory	IO
British Virgin Islands	VI
Brunei	BX
Bulgaria	BU
Burkina Faso	UV
Burma	BM
Burundi	BY
Cambodia	CB
Cameroon	CM
Canada	CA
Cape Verde	CV
Cayman Islands	CJ
Central African Republic	CT
Chad	CD
Chile	CI
China	CH
Christmas Island	KT
Clipperton Island	IP
Cocos (Keeling) Islands	CK



Country	Code
Colombia	CO
Comoros	CN
Congo, Democratic Republic of the	CG
Congo, Republic of the	CF
Cook Islands	CW
Coral Sea Islands	CR
Costa Rica	CS
Cote d'Ivoire	IV
Croatia	HR
Cuba	CU
Cyprus	CY
Czech Republic	EZ
Denmark	DA
Djibouti	DJ
Dominica	DO
Dominican Republic	DR
East Timor	TT
Ecuador	EC
Egypt	EG
El Salvador	ES
Equatorial Guinea	EK
Eritrea	ER
Estonia	EN
Ethiopia	ET
Europa Island	EU
Falkland Islands (Islas Malvinas)	FA



Country	Code
Faroe Islands	FO
Fiji	FJ
Finland	FI
France	FR
French Guiana	FG
French Polynesia	FP
French Southern and Antarctic Lands	FS
Gabon	GB
Gambia, The	GA
Gaza Strip	GZ
Georgia	GG
Germany	GM
Ghana	GH
Gibraltar	GI
Glorioso Islands	GO
Greece	GR
Greenland	GL
Grenada	GJ
Guadeloupe	GP
Guatemala	GT
Guernsey	GK
Guinea	GV
Guinea-Bissau	PU
Guyana	GY
Haiti	HA
Heard Island and McDonald Islands	HM



Country	Code
Honduras	HO
Hong Kong	HK
Howland Island	HQ
Hungary	HU
Iceland	IC
India	IN
Indonesia	ID
Iran	IR
Iraq	IZ
Ireland	EI
Israel	IL
Italy	IT
Jamaica	JM
Jan Mayen	JN
Japan	JA
Jarvis Island	DQ
Jersey	JE
Johnston Atoll	JQ
Jordan	JO
Juan de Nova Island	JU
Kazakhstan	KZ
Kenya	KE
Kingman Reef	KQ
Kiribati	KR
Korea, North	KN
Korea, South	KS



Country	Code
Kuwait	KU
Kyrgyzstan	KG
Laos	LA
Latvia	LG
Lebanon	LE
Lesotho	LT
Liberia	LI
Libya	LY
Liechtenstein	LS
Lithuania	LH
Luxembourg	LU
Macau	MC
Macedonia, The Republic of	MK
Madagascar	MA
Malawi	MI
Malaysia	MY
Maldives	MV
Mali	ML
Malta	MT
Man, Isle of IM	IM
Marshall Islands	RM
Martinique	MB
Mauritania	MR
Mauritius	MP
Mayotte	ME
Mexico	MX



Country	Code
Micronesia, Federated States of	FM
Midway Islands	MQ
Moldova	MD
Monaco	MN
Mongolia	MG
Montserrat	MH
Morocco	MO
Mozambique	MZ
Namibia	WA
Nauru	NR
Navassa Island	BQ
Nepal	NP
Netherlands	NL
Netherlands Antilles	NT
New Caledonia	NC
New Zealand	NZ
Nicaragua	NU
Niger	NG
Nigeria	NI
Niue	NE
Norfolk Island	NF
Northern Mariana Islands	CQ
Norway	NO
Oman	MU
Pakistan	PK
Palau	PS



Country	Code
Palmyra Atoll	LQ
Panama	PM
Papua New Guinea	PP
Paracel Islands	PF
Paraguay	PA
Peru	PE
Philippines	RP
Pitcairn Islands	PC
Poland	PL
Portugal	PO
Qatar	QA
Reunion	RE
Romania	RO
Russia	RS
Rwanda	RW
Saint Helena	SH
Saint Kitts and Nevis	SC
Saint Lucia	ST
Saint Pierre and Miquelon	SB
Saint Vincent and the Grenadines	VC
Samoa	WS
San Marino	SM
Sao Tome and Principe	TP
Saudi Arabia	SA
Senegal	SG
Serbia and Montenegro	YI



Country	Code
Seychelles	SE
Sierra Leone	SL
Singapore	SN
Slovakia	LO
Slovenia	SI
Solomon Islands	BP
Somalia	SO
South Africa	SF
South Georgia and the Islands	SX
Spain	SP
Spratly Islands	PG
Sri Lanka	CE
Sudan	SU
Suriname	NS
Svalbard	SV
Swaziland	WZ
Sweden	SW
Switzerland	SZ
Syria	SY
Taiwan	TW
Tajikistan	TI
Tanzania	TZ
Thailand	TH
Togo	TO
Tokelau	TL
Tonga	TN



Country	Code
Trinidad and Tobago	TD
Tromelin Island	TE
Tunisia	TS
Turkey	TU
Turkmenistan	TX
Turks and Caicos Islands	TK
Tuvalu	TV
Uganda	UG
Ukraine	UP
United Arab Emirates	AE
United Kingdom	UK
United States	US
Uruguay	UY
Uzbekistan	UZ
Vanuatu	NH
Vatican City	VT
Venezuela	VE
Vietnam	VM
Wake Island	WQ
Wallis and Futuna	WF
West Bank	WE
Western Sahara	WI
Yemen	YM
Zambia	ZA
Zimbabwe	ZI





Exhibits

This section includes the following topics:

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Form SF 2809, Health Benefits Election Form


 Health Benefits Election Form <i>Federal Employees Health Benefits Program</i>		Form Approved: OMB No. 3206-0160	
For Employees, Former Spouses Under the Spouse Equity Law, and Individuals Eligible for Temporary Continuation of Coverage			
* Complete Parts A and G, and Parts B, C, D, E, and F as applicable.		• Type or print firmly • Sign and date in Part	
Part A - Fill in this part.			
1. Name (last, first, middle initial)		2. Social Security Number	3. Date of birth (mm/dd/yyyy)
4. Your home mailing address (include ZIP code)		5. Sex <input type="checkbox"/> Male <input type="checkbox"/> Female	6. Are you now married? <input type="checkbox"/> Yes <input type="checkbox"/> No
		7. Daytime telephone number (include area code)	
Part B - Fill in this part if you wish to enroll or change your enrollment in the Federal Employees Health Benefits (FEHB) Program.			
1. I elect to enroll in a health benefits plan as shown below. (Copy the information requested below from front cover of brochure of the plan you select.)			
Name of plan		Enrollment code	
2a. Names of family members (last, first, middle initial)	2b. ZIP code	2c. Date of birth (mm/dd/yyyy)	2d. Sex
3a. Do you, your spouse or any other eligible family members have any group health insurance coverage other than the FEHB plan in which you are now enrolling or enrolled? <input type="checkbox"/> No <input type="checkbox"/> Yes — Complete 3b		Name of policyholder (last, first, middle initial)	
3b. Type of insurance <input type="checkbox"/> Medicare <input type="checkbox"/> You <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> Your spouse <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> TRICARE (Including CHAMPUS) <input type="checkbox"/> Other (specify name)			
Part C - Fill in this part, as well as PART B, to change enrollment.		Part D - Event	
1. Present Plan name	2. Present Plan enrollment code	1. Event code that permits change (see Table of Permissible Changes)	2. Date of event that permits change (mm/dd/yyyy)
Part E - Employees Only		Part F - Cancellation	
Place an "X" in the box below if you wish NOT TO ENROLL in the FEHB Program.		Place an "X" in the box below if you wish to CANCEL your enrollment.	
<input type="checkbox"/> I elect not to enroll in the Federal Employees Health Benefits Program.		<input type="checkbox"/> I elect to cancel my enrollment in the Federal Employees Health Benefits Program. I am currently enrolled under the code shown above.	
My signature in PART G certifies that I have read and understand the information on page 4 regarding this election.		My signature in PART G certifies that I have read the information in the instructions on page 4 regarding cancellation of enrollment and that I understand that I must meet the 5-year requirement to qualify for FEHB coverage after retirement.	
Part G - Fill in this part.			
WARNING: Any intentionally false statement in this application or willful misrepresentation relative thereto is a violation of the law punishable by a fine of not more than \$10,000 or imprisonment of not more than 5 years, or both. (18 U.S.C. 1001.)			
1. Your signature (do not print)		2. Date (mm/dd/yyyy)	
Part H - To be completed by agency			
1. Name and address of employing office (include ZIP code)	2. Date received in employing office (mm/dd/yyyy)	3. Effective date of action (mm/dd/yyyy)	4. SF 2811 report number
	5. Payroll office number	6. Payroll contact and telephone number (including area code)	
		()	
	7. Personnel contact and telephone number (including area code)		
	()		
	8. Signature of authorized agency official and telephone number (including area code)		
	()		
Remarks			
Office of Personnel Management		Standard Form 2809 Revised July 1999 Previous editions are not usable.	
NSN 7540-01-231-6227		Copy 1 - OFFICIAL PERSONNEL FOLDER	

Figure 170: Form SF 2809, Health Benefits Election Form



Form SF 2810, Notice of Change in Health Benefits Enrollment


 Federal Employees Health Benefits Program			Notice of Change in Health Benefits Enrollment		
Part A - Identifying Information					
1. Name (Last, first, middle initial)		2. Date of birth		3. Social security number	
4. Home address (including ZIP Code)		5. Payroll office number		6. Enrollment code number	
		7. SF 2811 Report number		8. Date this action becomes effective	
Only the item that is checked below affects your enrollment. Read that item carefully and follow any pertinent instructions. Keep this form for your records.					
Part B - Termination					
Your enrollment terminates on the date in Part A, item 8, above. However, your coverage is extended for 31 days after that date. Important Notice: You have the right to convert to an individual (nongroup) contract with the carrier of your plan. You also may have the right to temporarily continue your group coverage. See Part B - Termination on the back of this form for information about 31-day extension of coverage, conversion, and temporary continuation of coverage. If termination is due to death of enrollee enter date of death					
					Date of death (mo, dy, yr)
Part C - Transfer In			Part D - Reinstatement		
The new Payroll Office (or Retirement System) shown in Part H below has accepted transfer of this enrollment and will continue it.			Your enrollment has been reinstated effective on the date in Part A, item 8, above.		
Part E - Change in Name of Enrollee			Part F - Change In Enrollment-Survivor Annuitant		
The name under which this enrollment is carried has been changed to: Name _____ Date of Birth _____ Address (including ZIP Code) if different from Part A, item 4, above.			Your enrollment has been changed from family coverage to self only. Your plan will send you a new identification card. Your new enrollment code number is shown below. (Note: This item is completed by Retirement Systems only.) New Enrollment Code Number 		
Part G - Remarks					
Part H - Date of Notice					
<i>Note: Instructions for Employing Offices are on the back of Copy 4 of this form.</i>					
Name and address of agency (including ZIP Code)		Personnel contact and telephone number ()			
		Payroll contact and telephone number ()			
Signature of authorized agency official				Date	
<div style="display: flex; justify-content: space-between; font-size: small;"> <div>U.S. Office of Personnel Management CSRS/FERS Handbook for Personnel and Payroll Offices</div> <div>NSN 7540 01-232-1234</div> <div>Copy 1 - To Enrollee 2810-104</div> <div>Previous edition is usable</div> <div>Standard Form 2810 Revised June 1995</div> </div>					

Figure 171: Form SF 2810, Notice of Change in Health Benefits Enrollment Form

Form CLERC, CLER Security Access Form, Health Benefit Carrier Personnel

[illegible]

Figure 172: Form CLERC, CLER Security Access Form, Health Benefits Carrier Personnel



CLER Field Descriptions and Instructions

This section includes the following topics:

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(System Generated) Field Instructions

#	<i>System generated</i> Displays the number of discrepancies.
---	------------------------------------------------------------------

% (System Generated) Percentage of Discrepancies/Reconciliation Field Instructions

%	<i>System generated</i> Displays the percentage of discrepancies/reconciliation actions validated to total corrective actions.
---	-----------------------------------------------------------------------------------------------------------------------------------



% (System Generated) Percentage of Matching Records Field Instructions

%	<p><i>System generated</i></p> <p>Displays the percentage of matching records to enrollee records.</p>
---	--------------------------------------------------------------------------------------------------------

% (System Generated) Percentage of Reconciled Discrepancies Field Instructions

%	<p><i>System generated</i></p> <p>Displays the percentage of reconciled discrepancies to reported discrepancies.</p>
---	----------------------------------------------------------------------------------------------------------------------

Accepted (System Generated) Field Instructions

Accepted	<p><i>System generated</i></p> <p>Displays the number of transmissions that passed front-end edits and were accepted for processing.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p>
----------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Action (System Generated) Field Instructions

Action	<p><i>System generated</i></p> <p>Displays the reconciliation action code. For a list and descriptions of reconciliation action codes, see Reconciliation Action Codes Table (on page 258).</p>
--------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Action Code Field Instructions

Action Code	<p><i>Optional</i></p> <p>Select the reconciliation action code from the drop-down menu. For a list and descriptions of these codes, see Reconciliation Action Codes Table (on page 258).</p>
-------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------



Address (System Generated) Carrier Field Instructions

Address	<i>System generated</i> Displays the carrier's street or post office box address.
---------	--------------------------------------------------------------------------------------

Address (System Generated) Payroll Office Field Instructions

Address	<i>System generated</i> Displays the payroll office's street or post office box address.
---------	---------------------------------------------------------------------------------------------

Address 1 (System Generated) Personnel Office Field Instructions

Address Line 1	<i>System generated</i> Displays the first line of the personnel office contact's street or post office box address.
----------------	-------------------------------------------------------------------------------------------------------------------------

Address Line 1 Field Instructions

Address Line 1	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the first line of the carrier contact's street or post office box address.
----------------	-----------------------------------------------------------------------------------------------------------------------------------------

Address Line 1 (System Generated) Carrier Contact Field Instructions

Address Line 1	<i>System generated</i> Displays the first line of the carrier contact's street or post office box address.
----------------	----------------------------------------------------------------------------------------------------------------

Address Line 1 (System Generated) Carrier Field Instructions

Address Line 1	<i>System generated</i> Displays the first line of the carrier's street or post office box address.
----------------	--------------------------------------------------------------------------------------------------------



Address Line 1 (System Generated) Carrier Plan Contact Field Instructions

Address Line 1	<i>System generated</i> Displays the first line of the carrier plan contact's street or post office box address.
----------------	---------------------------------------------------------------------------------------------------------------------

Address Line 1 (System Generated) Payroll Office Contact Field Instructions

Address Line 1	<i>System generated</i> Displays the first line of the payroll office contact's street or post office box address.
----------------	-----------------------------------------------------------------------------------------------------------------------

Address Line 1 (System Generated) Payroll Office Field Instructions

Address Line 1	<i>System generated</i> Displays the first line payroll office's street or post office box address.
----------------	--------------------------------------------------------------------------------------------------------

Address Line 2 Field Instructions

Address Line 2	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the second line of the carrier contact's street or post office box address.
----------------	------------------------------------------------------------------------------------------------------------------------------------------

Address Line 2 (System Generated) Carrier Contact Field Instructions

Address Line 2	<i>System generated</i> Displays the second line of the carrier contact's street or post office box address.
----------------	-----------------------------------------------------------------------------------------------------------------



Address Line 2 (System Generated) Carrier Field Instructions

Address Line 2	<i>System generated</i> Displays the second line of the carrier's street or post office box address.
----------------	-------------------------------------------------------------------------------------------------------------

Address Line 2 (System Generated) Carrier Plan Contact Field Instructions

Address Line 2	<i>System generated</i> Displays the second line of the carrier plan contact's street or post office box address.
----------------	--------------------------------------------------------------------------------------------------------------------------

Address Line 2 (System Generated) Payroll Office Contact Field Instructions

Address Line 2	<i>System generated</i> Displays the second line of the payroll office contact's street or post office box address.
----------------	----------------------------------------------------------------------------------------------------------------------------

Address Line 2 (System Generated) Payroll Office Field Instructions

Address Line 2	<i>System generated</i> Displays the second line payroll office's street or post office box address.
----------------	-------------------------------------------------------------------------------------------------------------

Address Line 2 (System Generated) Personnel Office Contact Field Instructions

Address Line 2	<i>System generated</i> Displays the second line of the personnel office contact's street or post office box address.
----------------	------------------------------------------------------------------------------------------------------------------------------



Address Line 3 Field Instructions

Address Line 3	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the third line of the carrier contact's street or post office box address.
-----------------------	---------------------------------------------------------------------------------------------------------------------------------------------

Address Line 3 (System Generated) Carrier Contact Field Instructions

Address Line 3	<i>System generated</i> Displays the third line of the carrier contact's street or post office box address.
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Address Line 3 (System Generated) Carrier Field Instructions

Address Line 3	<i>System generated</i> Displays the third line of the carrier's street or post office box address.
-----------------------	------------------------------------------------------------------------------------------------------------

Address Line 3 (System Generated) Carrier Plan Contact Field Instructions

Address Line 3	<i>System generated</i> Displays the third line of the carrier plan contact's street or post office box address.
-----------------------	-------------------------------------------------------------------------------------------------------------------------

Address Line 3 (System Generated) Payroll Office Contact Field Instructions

Address Line 3	<i>System generated</i> Displays the third line of the payroll office contact's street or post office box address.
-----------------------	---------------------------------------------------------------------------------------------------------------------------



Address Line 3 (System Generated) Payroll Office Field Instructions

Address Line 3	<i>System generated</i> Displays the third line payroll office's street or post office box address.
----------------	------------------------------------------------------------------------------------------------------------

Address Line 3 (System Generated) Personnel Office Contact Field Instructions

Address Line 3	<i>System generated</i> Displays the third line of the personnel office contact's street or post office box address.
----------------	-----------------------------------------------------------------------------------------------------------------------------

Affects (System Generated) Field Instructions

Affects	<i>System generated</i> The values listed below indicate the following: Payroll Office - indicates the code affects the payroll office only. Carrier - indicates the code affects the carrier only. Both - indicates the code affects the payroll office and carrier. Not Applicable - indicates the code affects neither the payroll office nor carrier.
---------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Affects Carrier Field Instructions

Affects Carrier	<i>System generated</i> Valid values are Yes or No . Indicates whether or not the code affects the carrier.
-----------------	----------------------------------------------------------------------------------------------------------------------------------

Affects Payroll Field Instructions

Affects Payroll	<i>System generated</i> Valid Values are Yes or No . Indicates whether or not the code affects the payroll office.
-----------------	-----------------------------------------------------------------------------------------------------------------------------------------



Agcy (System Generated) Field Instructions

Agcy	<i>System generated</i> Displays the Agency ID code. This code consists of the Department code and Agency code.
-------------	------------------------------------------------------------------------------------------------------------------------

Agency (System Generated) Field Instructions

Agency	<i>System generated</i> Displays the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer). <u>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.</u>
---------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Agency (System Generated) Report Field Instructions

Agency	<i>System generated</i> Displays the Agency ID code. This code consists of the Department code and Agency code. <u>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Discrepancy Listing page.</u>
---------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Agency ID Field Instructions

Agency	<i>Optional, alphanumeric, 4 positions</i> Enter the Agency ID code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).
---------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------



Amount (System Generated) Field Instructions

Amount	<i>System generated</i> Displays the enrollee's withholding/premium.
--------	-------------------------------------------------------------------------

As of Date (System Generated) Field Instructions

As of Date	<i>System generated</i> Displays the date the transmitted enrollment data was extracted.
------------	---------------------------------------------------------------------------------------------

As of Date* (Drop-Down) Field Instructions

As of Date*	<i>Required</i> Select the from/to pay period from the drop-down menu.
-------------	---------------------------------------------------------------------------

As of Date* (Drop-Down) Req. From Field Instructions

As of Date* From	<i>Required</i> Select the from pay period from the drop-down menu.
------------------	------------------------------------------------------------------------

As of Date* (Drop-Down) Req. To Field Instructions

As of Date* To	<i>Required</i> Select the to pay period from the drop-down menu.
----------------	----------------------------------------------------------------------

Carr (System Generated) Field Instruction

Carr	<i>System generated</i> Displays the carrier code.
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Carrier Field Instructions

Carrier	<i>System generated</i> Displays the carrier code.
---------	-------------------------------------------------------

Carrier (Drop-Down) ID Field Instructions

Carrier	<i>Required</i> Select the carrier ID code from the drop-down menu.
---------	------------------------------------------------------------------------

Carrier (Drop-Down) Organization Carrier Code Field Instructions

Carrier	<i>Optional default</i> Select your organization's carrier code from the drop-down menu. If no code is selected, this field automatically defaults to your organization's carrier code.
---------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Carrier (Optional) Field Instructions

Carrier	<i>Optional, alphanumeric, 7 positions</i> Enter the carrier ID code.
---------	--------------------------------------------------------------------------

Carrier (Optional) Identification Code Field Instructions

Carrier	<i>Optional, alphanumeric, 7 positions</i> Enter the carrier ID code.
---------	--------------------------------------------------------------------------

Carrier (System Generated) Code Field Instructions

Carrier	<i>Optional</i> Select the carrier code from the drop-down menu.
---------	---------------------------------------------------------------------



Carrier (System Generated) Identification Code Field Instructions

Carrier	<i>System generated</i> Displays the carrier ID code.
---------	----------------------------------------------------------

Carrier* (Drop-Down) Field Instructions

Carrier*	<i>Required</i> Select the carrier code from the drop-down menu.
----------	---------------------------------------------------------------------

Carrier Comments (Conditional) 724 Field Instructions

Carrier Comments	<i>Conditional, alphanumeric, 400 positions maximum</i> Enter comments about this record. <u>Note: If 724 was selected in the Corrective Action field, comments explaining the corrective action must be entered in this field.</u>
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Carrier Comments (Conditional) Field Instructions

Carrier Comments	<i>Conditional, alphanumeric, 400 positions maximum</i> Enter comments about this record.
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Carrier Comments (System Generated) Field Instructions

Carrier Comments	<i>System generated</i> Displays the carrier's comments.
------------------	-------------------------------------------------------------



Carrier Discrepancy (System Generated) Field Instructions

Discrepancy	<i>System generated</i> Displays the error or warning code generated by CLER. For lists and descriptions of error and warning codes, see Discrepancy Codes Table (on page 251) and Warning Codes Table (on page 252).
--------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Carrier EFF. Date (System Generated) Field Instructions

Eff. Date	<i>System generated</i> Displays the enrollment effective date (MM/DD/YYYY) submitted by the carrier.
------------------	--------------------------------------------------------------------------------------------------------------

Carrier Errors (System Generated) Field Instructions

Carrier Errors	<i>System generated</i> Displays the count of errors that have a reconciliation reason and action entered that indicates that the carrier is at fault.
-----------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------

Carrier Fail Count (System Generated) Field Instructions

Fail Count	<i>System generated</i> Displays the number of times the initial discrepancy has been identified and reported.
-------------------	-----------------------------------------------------------------------------------------------------------------------

Carrier Field Instructions

Carrier	<i>Optional, alphanumeric, 4 positions</i> Enter your company's carrier code. Only the carrier code for your company should be entered in this field. If the carrier code is not entered, this field defaults to your company's carrier code.
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Carrier From: (System Generated) Gain/Loss Rpt 8 Field Instruction

From: Quarter/Year Carrier	<i>System generated</i> Displays the carrier code.
---------------------------------------	-----------------------------------------------------------



Carrier ID (Drop-Down) Field Instructions

Carrier Id	<i>Required</i> Select the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit from the drop-down menu.
------------	--------------------------------------------------------------------------------------------------------------------------------------

Carrier ID (System Generated) Field Instructions

Carrier ID	<i>System generated</i> Displays the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
------------	------------------------------------------------------------------------------------------------------------------------

Carrier ID Field Instructions

Carrier ID	<i>Required, alphanumeric, 7 positions</i> Enter the carrier ID code assigned by NFC's CLER Operations and Reconciliation Unit.
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Carrier ID* Field Instructions

Carrier ID*	<i>Required, default</i> Select your organization's carrier ID code from the drop-down menu. If no code is selected, this field automatically defaults to your organization's carrier ID code.
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Carrier ID* Carrier Discrepancy Field Instructions

Carrier ID*	<i>Optional, default</i> Select your organization's carrier ID code from the drop-down menu. If no code is selected, this field automatically defaults to your organization's carrier ID code.
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Carrier ID* Carrier Validation Field Instructions

Carrier ID*	<i>Required</i> Select the carrier ID number from the drop-down menu.
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Carrier Name (System Generated) Field Instructions

Name	<i>System generated</i> Displays the enrollee's name submitted by the carrier.
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Carrier To: (System Generated) Sys. Gen. Gain/Loss Rpt 8 Field Instruction

To: Quarter/Year Carrier	<i>System generated</i> Displays the carrier code.
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Carrier-Total Field Instructions

Carrier-Total	<i>System generated</i> Displays the sum of records by carrier. <div>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</div>
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Change (#) (System Generated) Field Instructions

Change (#)	<i>System generated</i> Displays the change in the number of enrollment code changes from the prior quarter to the current quarter.
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Change (%) (System Generated) Field Instructions

Change (%)	<i>System generated</i> Displays the change in percent of enrollment code changes from the prior quarter to the current quarter.
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Change Actual (System Generated) Field Instructions

Change Actual	<i>System generated</i> Displays the number that indicates the actual changes in values between prior and current reconciliation years/quarters.
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Change Password Field Instructions

Change Password	To change the password, click the checkbox. The Change Your Password pop-up window is displayed, prompting the user to enter and confirm the new password. Type the new password in the Enter New Password and Confirm New Password fields and click Submit .
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Change Percentage (System Generated) Field Instructions

Change Percent	<i>System generated</i> Displays the percent changes in values between prior and current reconciliation years/quarters.
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Check Box to Create Report Without Totals Field Instructions

Check box to create report without totals	<i>Optional</i> Select this check box to omit totals from the report.
--------------------------------------------------	------------------------------------------------------------------------------

City (System Generated) Carrier Contact Field Instructions

City	<i>System generated</i> Displays the name of the carrier contact's city. <hr/> Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city. <hr/>
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City (System Generated) Carrier Field Instructions

City	<i>System generated</i> Displays the name of the carrier's city. <hr/> Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city. <hr/>
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City (System Generated) Carrier Plan Field Instructions

City	<i>System generated</i> Displays the name of the carrier plan contact's city. <hr/> Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city. <hr/>
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City (System Generated) Payroll Office Contact Field Instructions

City	<i>System generated</i> Displays the name of the payroll office contact's city. <hr/> Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city. <hr/>
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City (System Generated) Payroll Office Field Instructions

City	<i>System generated</i> Displays the name of the payroll office's city. <hr/> Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city. <hr/>
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City (System Generated) Personnel Office Contact Field Instructions

City	<i>System generated</i> Displays the name of the personnel office contact's city. <u>Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.</u>
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City Carrier Contact Fields Instructions

City	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the name of the carrier contact's city.
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City Carrier Field Instructions

City	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the name of the carrier's city. <u>Note: If the address is an overseas military address, type FPO for fleet post office or APO for army post office in lieu of the city.</u>
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City Carrier Plan Contact Field Instructions

City	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the name of the carrier plan contact's city.
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City Payroll Office Field Instructions

City	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the name of the payroll office's city.
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Code (System Generated) Submitted by Carrier Field Instructions

Code	<i>System generated</i> Displays the enrollment code submitted by the carrier.
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Code (System Generated) Enrollment Code Field Instructions

Code	<i>System generated</i> Displays the enrollment code.
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Code (System Generated) Submitted by Payroll Office/Carrier Field Instructions

Code	<i>System generated</i> Displays the enrollment code submitted by the payroll office/carrier.
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Code (System Generated) Code Number Field Instructions

Code	<i>System generated</i> Displays the code number. For lists and descriptions of valid codes, see CLER Reference Tables (on page 251).
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Code (System Generated) Transmissions Processing Code Field Instructions

Code	<i>System generated</i> Displays the transmission processing code. The code I (Initial) or blank indicates an initial file, code A (Add) indicates an additional file, and code R (Replace) indicates replace all previous files.
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Code From: (System Generated) Gain/Loss Rpt. 8 Field Instruction

From: Quarter/Year Code	<i>System generated</i> Displays the enrollment code.
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Code To: (System Generated) Gain/Loss Rpt. 8 Field Instruction

To: Quarter/Year Code	<i>System generated</i> Displays the enrollment code.
-----------------------	----------------------------------------------------------

Code-Total (System Generated) Field Instructions

Code-Total	<i>System generated</i> Displays the sum of records by enrollment code. <u>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</u>
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Confirmed Errors (System Generated) Field Instructions

Confirmed Errors	<i>System generated</i> Displays the count of errors that have a reconciliation reason and action entered that indicate that the carrier is at fault and that the carrier accepts.
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Corrective Action (System Generated) Carrier Validation Field Instructions

Corrective Action	<i>System generated</i> Displays the code that identifies the carrier's response to the validation action code displayed in the Validation Action field.
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Corrective Action (System Generated) Field Instructions

Corrective Action	<i>System generated</i> Displays the code that identifies the carrier's response to the reconciliation action code displayed in the Reconciliation Action field. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Carrier Corrective Action Response Codes Table (on page 259).
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Corrective Action* Field Instructions

Corrective Action*	<i>System generated</i> Click from the drop-down menu and select. Displays the code that identifies the carrier's response to the reconciliation action code displayed in the Reconciliation Action field. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Carrier Corrective Action Response Codes Table (on page 259).
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Cut Off Date (System Generated) Field Instructions

Cut Off Date	<i>System generated</i> Displays the date that CLER accepts no quarterly enrollment data from carriers or payroll offices.
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Date Due (System Generated) Field Instructions

Date Due	<i>System generated</i> Displays the transmission due date (MMDDYYYY) for the reconciliation quarter.
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Date Processed (System Generated) Field Instructions

Date Processed	<i>System generated</i> Displays the date the record was processed.
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Date Processed (System Generated) Transmissions Field Instructions

Date Processed	<i>System generated</i> Displays the current system date when the process was run.
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Deceased Annuitant SSN (System Generated) Field Instructions

Deceased Annuitant SSN	<i>System generated</i> Displays the deceased annuitant enrollee's SSN.
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Description (System Generated) Enrollment Field Instructions

Description	<i>System generated</i> Displays the descriptive text that corresponds the enrollment record.
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Description (System Generated) Field Instructions

Description	<i>System generated</i> Displays the descriptive text that corresponds to the code.
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Discrepancies (System Generated) 163 Search Field Instructions

Discrepancies	<i>System generated</i> Displays Discrepancy Code 163. For a detailed explanation of Discrepancy Code 163, see Discrepancy Codes Table (on page 251). <hr/> <p>Note: Check marks are displayed next to discrepancy codes that have been addressed by Agencies and carriers. Red check marks are displayed next to discrepancies that have been addressed by Agencies. Green check marks are displayed next to discrepancies that have been addressed by carriers. To display the most current check marks, select Refresh at the top of the Payroll Office Enrollees Search Results page.</p> <hr/>
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Discrepancies (System Generated) Search Field Instructions

Discrepancies	<p><i>System generated</i></p> <p>Displays an error or warning. For lists and descriptions of error and warning codes, see Discrepancy Codes Table (on page 251) and Warning Codes Table (on page 252).</p> <hr/> <p>Note: Check marks are displayed next to discrepancy codes that have been addressed by Agencies and carriers. Red check marks are displayed next to discrepancies that have been addressed by Agencies. Green check marks are displayed next to discrepancies that have been addressed by carriers. To display the most current check marks, select Refresh at the top of the Carrier Enrollees Search Results page.</p>
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Discrepancy (System Generated) 163 View Field Instructions

Discrepancy	<p><i>System generated</i></p> <p>Displays Discrepancy Code 163. A short description is displayed next to the code. To view a detailed explanation of this code, click Explain or see Discrepancy Codes Table (on page 251).</p>
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Discrepancy (System Generated) Discrepancy Listing Field Instructions

Discrepancy	<p><i>System generated</i></p> <p>Displays the error or warning code generated by CLER. For lists and descriptions of error and warning codes, see Discrepancy Codes Table (on page 251) and Warning Codes Table (on page 252).</p>
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Discrepancy (System Generated) View Field Instructions

Discrepancy	<p><i>System generated</i></p> <p>Displays an error or warning. A short description is displayed next to the code. For a detailed explanation of the discrepancy code, click Explain or see Discrepancy Codes Table (on page 251). If Discrepancy Code 166 is displayed in the Discrepancy field, the Duplicate button is also displayed. Click Duplicate to display the duplicate carrier enrollee record for this enrollee record.</p>
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Display Carrier Enrollees Field Instructions

Display	<p><i>Optional, default</i></p> <p>Defaults to All display. This field allows users to display search results by the options listed below. To choose a display option, select the radio button next to one of the following values:</p> <p>All Records - Displays all records related to the search criteria.</p> <p>Matches - Displays all matched records related to the search criteria.</p> <p>No Matches - Displays all unmatched records related to the search criteria.</p> <p>Discrepancies - Displays all records with discrepancies related to the search criteria.</p> <p>Warnings - Displays all records with warnings related to the search criteria.</p> <p>Unreconciled - Displays all records with unreconciled discrepancies related to the search criteria.</p> <p>Reconciled - Displays all records with reconciled discrepancies related to the search criteria.</p> <p>Confirmed - Displays all records with confirmed discrepancies related to the search criteria. Confirmed discrepancies are discrepancies where the carrier is in agreement with the payroll office's reconciliation reason and reconciliation action.</p> <p>Disputed - Displays all records with disputed discrepancies related to the search criteria. Disputed discrepancies are discrepancies where the carrier is not in agreement with the payroll office's reconciliation reason and reconciliation action.</p> <p>Not Validated - Displays all records that have not been validated.</p>
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Display Field Instructions

Display	<p><i>Optional, default</i></p> <p>Defaults to All display option. Allows users to display search results by the options listed below. To choose a display option, select the radio button next to one of the following values:</p> <p>All - Displays all contacts for the payroll office ID and type code entered.</p> <p>Active - Displays active contacts for the payroll office ID and type code entered.</p> <p>Inactive - Displays inactive contacts for the payroll office ID and type code entered.</p>
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Display Payroll Discrepancy Listing Field Instructions

Display	<p><i>Optional, default</i></p> <p>Allows users to display search results by the options listed below. If no display option is selected, this field automatically defaults to the All option. To choose a display option, select the radio button next to one of the following values:</p> <p>All - Displays all records related to the search criteria.</p> <p>Unreconciled - Displays all records with unreconciled discrepancies related to the search criteria.</p> <p>Errors - Displays all records with errors related to the search criteria.</p> <p>Warnings - Displays all records with warnings related to the search criteria.</p> <p>Reconciled - Displays all records with reconciled discrepancies related to the search criteria.</p> <p>Matches - Displays all records with matches related to the search criteria.</p> <p>Not Validated - Displays records related to the search criteria that have not been validated.</p>
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Display Payroll Office Enrollees Field Instructions

Display (Payroll Office Enrollees)	<p><i>Optional, default</i></p> <p>Defaults to All display. This field allows users to display search results by the options listed below. To choose a display option, select the radio button next to one of the following values:</p> <p>All Records - Displays all records related to the search criteria.</p> <p>Matches - Displays all matched records related to the search criteria.</p> <p>No Matches - Displays records with no matches related to the search criteria. No Matches are discrepancies where the carrier record is not found.</p> <p>Discrepancies - Displays all records with discrepancies related to the search criteria.</p> <p>Warnings - Displays all records with warnings related to the search criteria.</p> <p>Unreconciled - Displays all records with unreconciled discrepancies related to the search criteria. Unreconciled discrepancies are discrepancies where the payroll office has not entered a reconciliation reason or reconciliation action code.</p> <p>Reconciled - Displays all records with reconciled discrepancies related to the search criteria.</p> <p>Confirmed - Displays all records with confirmed discrepancies related to the search criteria. Confirmed discrepancies are discrepancies where the carrier is in agreement with the payroll office's reconciliation reason and reconciliation action.</p> <p>Disputed - Displays all records with disputed discrepancies related to the search criteria. Disputed discrepancies are discrepancies where the carrier is not in agreement with the payroll office's reconciliation reason and reconciliation action.</p> <p>Not Validated - Displays all records with discrepancies that are not validated. Not Validated discrepancies are discrepancies that the carrier has not yet agreed that the Agency's reconciliation reason and actions are correct.</p>
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Display System Codes Field Instructions

Display	<p><i>Optional, default</i></p> <p>Defaults to All display. This field allows users to display search results by the options listed below. To choose a display option, select the radio button next to one of the following values:</p> <p>All - Displays all codes.</p> <p>Discrepancy - Displays all discrepancy codes.</p> <p>Warning - Displays all warning codes.</p> <p>Reconciliation Reason - Displays all reconciliation reason codes.</p> <p>Reconciliation Action - Displays all reconciliation action codes.</p> <p>Corrective Action - Displays all corrective action response codes.</p> <p>System - Displays all system codes.</p>
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Display Total Payment Amounts Field Instructions

Display Total Payment Amounts	<p><i>Optional, default</i></p> <p>Defaults to the Display Total Payment Amounts menu option, which displays the total payment amounts. To display the payment amounts for enrollees, select the radio button next to the menu option Display Payment Amounts for Enrollees.</p>
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Disputed Errors (System-Generated) Field Instructions

Disputed Errors	<p><i>System generated</i></p> <p>Displays the count of errors that have a reconciliation reason and action entered that indicate that the carrier is at fault and that the carrier disputes.</p>
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Eff. Date (System Generated) Report Field Instructions

Eff. Date	<p><i>System generated</i></p> <p>Displays the effective date (MM/DD/YYYY) submitted by the payroll office/carrier.</p>
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Effective Date (System Generated) Field Instructions

Effective Date	<i>System generated</i> Displays the effective date of the enrollment.
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Email (Optional) Carrier Contact Field Instructions

Email	<i>Optional, alphanumeric, 60 positions</i> Enter the carrier contact's email address.
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Email (System Generated) Carrier Contact Field Instruction

Email	<i>System generated</i> Displays the carrier contact's email address.
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Email (System Generated) Carrier Plan Contact Field Instruction

Email	<i>System generated</i> Displays the carrier plan contact's email address.
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Email (System Generated) Payroll Office Field Instructions

Email	<i>System generated</i> Displays the payroll office contact's email address.
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Email (System Generated) Personnel Office Field Instructions

Email	<i>System generated</i> Displays the personnel office contact's email address.
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Email Address Carrier Contact Field Instructions

Email Address	<i>Optional, alphanumeric, 60 positions</i> Enter the carrier contact's email address.
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Email Address Carrier Plan Contact Field Instructions

Email Address	<i>Optional, alphanumeric, 60 positions</i> Enter the carrier plan contact's email address.
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Email Address (System Generated) Carrier Contact Field Instructions

Email Address	<i>System generated</i> Displays the carrier contact's email address.
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Email Address (System Generated) Carrier Plan Contact Field Instructions

Email Address	<i>System generated</i> Displays the carrier plan contact's email address.
----------------------	-------------------------------------------------------------------------------

Email Address (System Generated) Personnel Office Contact Field Instructions

Email Address	<i>System generated</i> Displays the personnel office contact's email address.
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Email Date (System Generated) Transmissions Field Instructions

Email Date	<i>System generated</i> Displays the date the last email was sent to this submitter as a reminder to send a transmission for the current reconciliation quarter.
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Email/Email Address (System Generated) Personnel Office Field Instructions

Email/Email Address	<i>System generated</i> Displays the personnel office contact's email address.
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Email Time (System Generated) Transmissions Field Instructions

Email Time	<i>System generated</i> Displays the time the last email was sent to this submitter as a reminder to send a transmission for the current reconciliation quarter.
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End Date (System Generated) Carrier Enrollment Code Field Instructions

End Date	<i>System generated</i> Displays the the last date the carrier enrollment code will be valid.
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End Date (System Generated) Carrier Field Instructions

End Date	<i>System generated</i> Displays the last date (MMDDYYYY) the carrier plan will be valid. If the date is not known, 12/31/9999 is displayed.
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End Date (System Generated) Field Instructions

End Date	<i>System generated</i> Displays the last date the payroll office will be valid.
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Enrollee (System Generated) Field Instructions

Enrollee	<i>System generated</i> Displays the enrollee's name.
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Enrollee SSN (System Generated) Field Instructions

Enrollee SSN	<i>System generated</i> Displays the enrollee's SSN.
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Enrollees (Left/Drop) (System Generated) Field Instructions

Enrollees (Left/Drop)	<i>System generated</i> Displays the number of dropped enrollees.
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Enrollees (New/Add (System Generated) Field Instructions

Enrollees (New/Add)	<i>System generated</i> Displays the number of new or added enrollees.
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Enrollees (System Generated) Reconciliation Summary Field Instructions

Enrollees	<i>System generated</i> Displays the number of enrollee records that meet the criteria entered on the Reconciliation Summary page.
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Enrollment Changes % (System Generated) Added Field Instructions

Enrollment Changes %	<i>System generated</i> Displays the percent of enrollment changes that were added.
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Enrollment Changes % (System Generated) Dropped Field Instructions

Enrollment Changes %	<i>System generated</i> Displays percent of enrollment changes that were dropped.
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Enrollment Changes Added (System Generated) Field Instructions

Enrollment Changes Added	<i>System generated</i> Displays the number of enrollment changes that were added.
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Enrollment Changes Dropped (System Generated) Field Instructions

Enrollment Changes Dropped	<i>System generated</i> Displays the number of enrollment changes that were dropped.
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Enrollment Code Field Instructions

Enrollment Code	<i>Optional, alphanumeric, 3 positions</i> Enter the enrollment/carrier enrollment code.
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Enrollment Code (Drop-Down) Field Instructions

Enrollment Code	<i>Optional</i> Select the enrollment code from the drop-down list.
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Enrollment Code (System Generated) Field Instructions

Enrollment Code	<i>System generated</i> Displays the enrollment code/carrier enrollment code.
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Error Code (Drop-Down) Field Instructions

Error Code	<i>Optional</i> Select the applicable error code from the drop-down menu. For a list and descriptions of error codes, see Discrepancy Codes Table (on page 251).
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Error Codes Field Instructions

Error Code	<i>Optional</i> Click the arrows to locate the applicable error code from the list of error codes and select this code. For a list and descriptions of error codes, see Discrepancy Codes Table (on page 251).
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Error Threshold (System Generated) Field Instructions

Error Threshold	<i>System generated</i> Displays the number of percentage of errors permitted for the payroll office/carrier before a transmission file is rejected.
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Errors (System Generated) Field Instructions

Errors	<i>System generated</i> Displays the sum of error codes displayed in the Discrepancy field. <hr/> <u>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</u> <hr/>
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Errors Reconciled (System Generated) Field Instructions

Errors Reconciled	<i>System generated</i> Displays the count of errors that have a reconciliation reason and action entered.
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Explanation (System Generated) Field Instructions

Explanation	<i>System generated</i> Displays the detailed explanation of the code.
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Fail Count (System Generated) Field Instructions

Fail Count	<i>System generated</i> Displays the number of times this record has failed the quarterly edit process.
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Fail Count Discrepancy and Reconciliation Reports Field Instructions

Fail Count	<i>System generated</i> Displays the number of times the initial discrepancy has been identified and reported.
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Fail Count From Field Instructions

Fail Count From	<i>Optional, numeric, 3 positions maximum.</i> Enter a specific fail count number to search for enrollee records by a specific fail count number, then proceed to the To field. OR Enter the number that starts the range of fail count numbers to search for enrollee records by a range of fail count numbers, then proceed to the To field.
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Fail Count To Field Instructions

Fail Count To	<i>Optional, numeric, 3 positions maximum</i> Entered the number that was entered in the From field to search enrollee records by a specific fail count number. OR Enter the number that ends the range of fail count numbers to search for enrollee records by a range of fail count numbers.
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Fax Number Carrier Contact Field Instructions

Fax Number	<i>Optional, alphanumeric, 25 positions</i> Enter the carrier contact's fax number.
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Fax Number Carrier Plan Contact Field Instructions

Fax Number	<i>Optional, alphanumeric, 25 positions</i> Enter the carrier plan contact's fax number.
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Fax Number (System Generated) Carrier Contact Field Instructions

Fax Number	<i>System generated</i> Displays the carrier contact's fax number.
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Fax Number (System Generated) Carrier Plan Contact Field Instructions

Fax Number	<i>System generated</i> Displays the carrier plan contact's fax number.
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Fax Number (System Generated) Payroll Office Contact Field Instructions

Fax Number	<i>System generated</i> Displays the payroll office contact's fax number.
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Fax Number (System Generated) Personnel Office Contact Field Instructions

Fax Number	<i>System generated</i> Displays the personnel office contact's fax number.
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First Name Field Instructions

First Name	<i>Optional, alphanumeric, 12 positions maximum</i> Enter the enrollee's first name. This must be provided with the exception of an enrollee with only one name.
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First Name (System Generated) Field Instructions

First Name	<i>System generated</i> Displays the enrollee's first name.
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Foreign Country (Drop-Down) Carrier Contact Field Instructions

Foreign Country	<i>Optional</i> Select the carrier contact's country code from the drop-down menu. For a list and descriptions of country codes, see Country Codes Table (on page 262).
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Foreign Country (Drop-Down) Carrier Plan Contact Field Instructions

Foreign Country	<i>Optional</i> Select the carrier plan contact's country code from the drop-down menu. For a list and descriptions of country codes, see Country Codes Table (on page 262).
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Foreign Country (System Generated) Carrier Contact Field Instructions

Foreign Country	<i>System generated</i> Displays the carrier contact's country code. For a list and descriptions of country codes, see Country Codes Table (on page 262).
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Foreign Country (System Generated) Carrier Field Instructions

Foreign Country	<i>System generated</i> Displays the carrier's country code. For a list and descriptions of country codes, see Country Codes Table (on page 262).
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Foreign Country (System Generated) Carrier Plan Contact Field Instructions

Foreign Country	<i>System generated</i> Displays the carrier plan contact's country code. For a list and descriptions of country codes, see Country Codes Table (on page 262).
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Foreign Country (System Generated) Payroll Office Contact Field Instructions

Foreign Country	<i>System generated</i> Displays the payroll office contact's country code. For a list and descriptions of country codes, see Country Codes Table (on page 262).
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Foreign Country (System Generated) Payroll Office Field Instructions

Foreign Country	<i>System generated</i> Displays the payroll office's country code. For a list and descriptions of country codes, see Country Codes Table (on page 262).
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Foreign Country (System Generated) Personnel Office Contact Field Instructions

Foreign Country	<i>System generated</i> Displays the personnel office contact's country code. For a list and descriptions of country codes, see Country Codes Table (on page 262).
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From (Quarter/Year) (System Generated) Field Instructions

From (Quarter/Year)	<i>System generated</i> Displays the number of enrollees covered by the enrollment code displayed in the Code field during the selected quarter and year.
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Grand-Total (System Generated) Field Instructions

Grand-Total	<i>System generated</i> Displays the sum of records by enrollment code and carrier. <div>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</div>
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ID (System Generated) Field Instructions

ID	<i>System generated</i> Displays the payroll office identification number.
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Indicator (System Generated) Field Instructions

Indicator	<i>System generated</i> Displays if the transmission has been validated by the carrier. Y indicates the transmission has been validated, C indicates the transmission has been cancelled, and an empty field indicates the transmission has not been validated.
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Last Carrier Update Date (System Generated) Field Instructions

Last Carrier Update Date	<i>System generated</i> Displays the date of the most recent change.
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Last Carrier Update ID (System Generated) Field Instructions

Last Carrier Update ID	<i>System generated</i> Displays the user ID number of the carrier representative/individual who made the most recent change to the record.
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Last Carrier Update Time (System Generated) Field Instructions

Last Carrier Update Time	<i>System generated</i> Displays the the time of the most recent change.
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Last Changed Date (System Generated) Field Instructions

Last Changed Date	<i>System generated</i> Displays the date of the most recent change.
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Last Changed ID (System Generated) Field Instructions

Last Changed ID	<i>System generated</i> Displays the user ID number of the individual who made the most recent change to the record.
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Last Changed Time (System Generated) Field Instructions

Last Changed Time	<i>System generated</i> Displays the time of the most recent change.
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Last CL10 Date (System Generated) Field Instructions

Last CL10 Date	<i>System generated</i> Displays the last date of the initial editing and processing of the payroll office enrollment file transmission.
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Last CL10 Time (System Generated) Field Instructions

Last CL10 Time	<i>System generated</i> Displays the last time of the initial editing and processing of the payroll office enrollment file transmission.
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Last CL20 Date (System Generated) Field Instructions

Last CL20 Date	<i>System generated</i> Displays the last date of the initial editing and processing of the carrier enrollment file transmission.
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Last CL20 Time (System Generated) Field Instructions

Last CL20 Time	<i>System generated</i> Displays the last time of the initial editing and processing of the carrier enrollment file transmission.
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Last CL30 Date (System Generated) Field Instructions

Last CL30 Date	<i>System generated</i> Displays the last date the payroll office enrollment record fields were edited and matched.
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Last CL30 Time (System Generated) Field Instructions

Last CL30 Time	<i>System generated</i> Displays the last time the payroll office enrollment record fields were edited and matched.
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Last CL40 Date (System Generated) Field Instructions

Last CL40 Date	<i>System generated</i> Displays the last date the carrier enrollment record fields were edited and matched.
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Last CL40 Time (System Generated) Field Instructions

Last CL40 Time	<i>System generated</i> Displays the last time the carrier enrollment record fields were edited and matched.
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Last CL50 Date Field Instructions

Last CL50 Date	Reserved for future use.
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Last CL50 Time Field Instructions

Last CL50 Time	Reserved for future use.
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Last CL60 Date (System Generated) Field Instructions

Last CL60 Date	<i>System generated</i> Displays the last date the error statistics record fields were updated.
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Last CL60 Time (System Generated) Field Instructions

Last CL60 Time	<i>System generated</i> Displays the last time the error statistics record fields were updated.
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Last CL70 Date Field Instructions

Last CL70 Date	Reserved for future use.
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Last CL70 Time Field Instructions

Last CL70 Time	Reserved for future use.
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Last CL80 Date (System Generated) Field Instructions

Last CL80 Date	<i>System generated</i> Displays the last date the 2809 corrective action files were processed and transmitted to OPM Data Hub.
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Last CL80 Time (System Generated) Field Instructions

Last CL80 Time	<i>System generated</i> Displays the last time the 2809 corrective action files were processed and transmitted to OPM Data Hub.
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Last CL90 Date (System Generated) Field Instructions

Last CL90 Date	<i>System generated</i> Displays the last date the 2810 corrective action files were processed and transmitted to OPM Data Hub.
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Last CL90 Time (System Generated) Field Instructions

Last CL90 Time	<i>System generated</i> Displays the last time the 2810 corrective action files were processed and transmitted to OPM Data Hub.
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Last Name Field Instructions

Last Name	<i>Optional, alphanumeric, 25 positions maximum</i> Enter the enrollee's last name. If the enrollee has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III). If there is a case of an enrollee having only one name, enter that one name in this field.
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Last Name (System Generated) Field Instructions

Last Name	<i>System generated</i> Displays the enrollee's last name.
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Last Payroll Update Date (System Generated) Field Instructions

Last Payroll Update Date	<i>System generated</i> Displays the date of the most recent change.
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Last Payroll Update ID (System Generated) Field Instructions

Last Payroll Update ID	<i>System generated</i> Displays the user ID number of the payroll office representative who made the most recent change to the record.
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Last Payroll Update Time (System Generated) Field Instructions

Last Payroll Update Time	<i>System generated</i> Displays the time of the most recent change.
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Last Validate Date (System Generated) Field Instructions

Last Validate Date	<i>System generated</i> Displays the date the transmission was last validated.
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Last Validate ID (System Generated) Field Instructions

Last Validate ID	<i>System generated</i> Displays the user ID number of the person who last validated the transmission.
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Last Validate Time (System Generated) Field Instructions

Last Validate Time	<i>System generated</i> Displays the time the transmission was last validated.
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Match (System Generated) Field Instructions

Match	<i>System generated</i> Displays the number of matching records that meet the criteria entered on the Reconciliation Summary page.
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Middle Name Field Instructions

Middle Name	<i>Optional, alphanumeric, 12 positions maximum</i> Enter the enrollee's middle name/initial.
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Middle Name (System Generated) Field Instructions

Middle Name	<i>System generated</i> Displays the enrollee's middle name or initial.
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Name (Optional) Carrier Contact Field Instructions

Name	<i>Optional, alphanumeric, 30 positions maximum</i> Enter the name of the carrier contact.
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Name (System Generated) Carrier Contact Field Instructions

Name	<i>System generated</i> Displays the name of the carrier contact.
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Name (System Generated) Carrier Field Instructions

Name	<i>System generated</i> Displays the name of the carrier.
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Name (System Generated) Carrier Plan Contact Field Instructions

Name	<i>System generated</i> Displays the name of the carrier plan contact.
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Name (System Generated) Payroll Office Contact Field Instructions

Name	<i>System generated</i> Displays the name of the payroll office contact.
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Name (System Generated) Payroll Office Field Instructions

Name	<i>System generated</i> Displays the name of the payroll office.
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Name (System Generated) Personnel Office Field Instructions

Name	<i>System generated</i> Displays the name of the personnel office contact.
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Name (System Generated) Report Field Instructions

Name	<i>System generated</i> Displays the enrollee's name submitted by the payroll office/carrier.
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Name (System Generated) Rpt.1, Carrier Field Instructions

Name	<i>System generated</i> Displays the enrollee's name submitted by the carrier.
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Name Carrier Field Instructions

Name	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the name of the carrier.
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Name Carrier Plan Contact Field Instructions

Name	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the name of the carrier plan contact.
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Name Payroll Office Field Instructions

Name	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the name of the payroll office.
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Not Received (System Generated) Field Instructions

Not Received	<i>System generated</i> Displays the number of transmissions that were expected but not received. <u>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</u>
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Note Field Instructions

Note	Enter FPO for fleet post office or APO for army post office in lieu of the city if the address is an overseas military address.
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Order By Carrier Field Instructions

Order By	<i>Optional, default</i> Defaults to the Carrier sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values: Carrier - Search by carrier code. Name - Search by name. City - Search by city. State - Search by State.
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Order By Carrier Code Field Instructions

Order By	<p><i>Optional, default</i></p> <p>Defaults to the Carrier sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values:</p> <p>Carrier - Search by carrier code.</p> <p>Code - Search by carrier enrollment code.</p>
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Order By Carrier Contacts Field Instructions

Order By	<p><i>Optional, default</i></p> <p>Defaults to the Carrier sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values:</p> <p>Carrier ID - Search by Carrier ID.</p> <p>Year/Quarter - Search by reconciliation year and reconciliation quarter.</p>
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Order By Carrier Errors Page Field Instructions

Order By	<p><i>Optional, default</i></p> <p>Defaults to the Carrier sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values:</p> <p>Carrier ID - Search by carrier ID.</p> <p>Year/Quarter - Search by reconciliation year and reconciliation quarter.</p>
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Order By Carrier Plan Contacts Field Instructions

Order By	<p><i>Optional, default</i></p> <p>Defaults to the Carrier sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values:</p> <p>Carrier - Search by carrier code.</p> <p>Plan - Search by plan code.</p> <p>Type - Search by type code.</p>
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Order By Contacts Page Field Instructions

Order By	<p><i>Optional, default</i></p> <p>Defaults to the ID sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values:</p> <p>ID - Search by ID number.</p> <p>Type - Search by type code.</p>
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Order By Payroll Office Information Page Field Instructions

Order By	<p><i>Optional, default</i></p> <p>Defaults to the ID sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values:</p> <p>ID - Search by payroll office identification number.</p> <p>Pay Cycle - Search by pay cycle.</p> <p>Name - Search by payroll office name.</p> <p>City - Search by payroll office city.</p>
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Order By Personnel Office Contacts Page Field Instructions

Order By	<p><i>Optional, default</i></p> <p>Defaults to the ID sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select the radio button next to one of the following values:</p> <p>ID - Search by payroll office identification number.</p> <p>POI - Search by personnel office identification number.</p> <p>Type - Search by type code.</p>
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Order By: 1st Field Instructions

Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Name sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>
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Order By: 1st Carrier Discrepancy Field Instructions

Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Name option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Payroll ID - Search by payroll office identification number.</p>
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Order By: 1st Carrier Enrollees Field Instructions

Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Name sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
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Order By: 1st Carrier Enrollment Transmission Field Instructions

Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Name sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Carrier ID - Search by carrier ID number.</p> <p>Name - Search by enrollee name.</p> <p>Year/Quarter - Search by reconciliation year and reconciliation quarter.</p> <p>Submission Date - Search by submission date.</p> <p>Status - Search by transmission status.</p>
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Order By: 1st Carrier Validation Field Instructions

Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Name sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
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Order By: 1st Pay Period Transmissions Payment Amounts Report Field Instructions

Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Carrier option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Carrier - Search by carrier.</p> <p>Pay Cycle - Search by pay cycle.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>As of Date - Search by as of date.</p>
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Order By: 1st Payroll Discrepancy Listing Field Instructions

Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Name sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by the RSP/OWCP to identify the enrollee.</p>
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Order By: 1st Reconciliation Action Field Instructions

Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Carrier option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Action Code - Search by reconciliation action code.</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Personnel Office ID - Search by POI number.</p>
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Order By: 1st Reconciliation Reason Field Instructions

Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Carrier option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order.</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reason Code - Search by reconciliation reason code.</p>
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Order By: 1st Reconciliation Report Field Instructions

Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Name sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Agency - Search results by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reconciliation Date - Search by reconciliation date.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p> <p>User ID - Search by user ID number.</p>
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Order By: 1st Reconciliation Summary Field Instructions

Order By: 1st	<p><i>Optional, default</i></p> <p>Defaults to the Carrier option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in first sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Personnel Office ID - Search by POI number.</p>
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Order By: 2nd Field Instructions

Order By: 2nd	<p><i>Optional, default</i></p> <p>Defaults to the SSNO sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>
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Order By: 2nd Carrier Discrepancy Field Instructions

Order By: 2nd	<p><i>Optional, default</i></p> <p>Defaults to the SSNO option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Payroll ID - Search by payroll office identification number.</p>
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Order By: 2nd Carrier Enrollees Field Instructions

Order By: 2nd	<p><i>Optional, default</i></p> <p>Defaults to the SSNO sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
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Order By: 2nd Carrier Enrollment Transmission Field Instructions

Order By: 2nd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Carrier ID - Search by carrier ID number.</p> <p>Name - Search by enrollee name.</p> <p>Year/Quarter - Search by reconciliation year and reconciliation quarter.</p> <p>Submission Date - Search by submission date.</p> <p>Status - Search by transmission status.</p>
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Order By: 2nd Carrier Validation Field Instructions

Order By: 2nd	<p><i>Optional</i></p> <p>Defaults to the Name sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
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Order By: 2nd Pay Period Transmission Payment Amounts Report Field Instructions

Order By: 2nd	<p><i>Optional, default</i></p> <p>This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Carrier - Search by carrier.</p> <p>Pay Cycle - Search by pay cycle.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>As of Date - Search by as of date.</p>
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Order By: 2nd Payroll Discrepancy Listing Field Instructions

Order By: 2nd	<p><i>Optional, default</i></p> <p>Defaults to the SSNO sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Agency - Sorts search results by Agency code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/ OWCP to identify the enrollee.</p>
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Order By: 2nd Reconciliation Action Field Instructions

Order By: 2nd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Action Code - Search by reconciliation action code.</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Personnel Office ID - Search by POI number.</p>
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Order By: 2nd Reconciliation Reason Field Instructions

Order By: 2nd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reason Code - Search by reconciliation reason code.</p>
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Order By: 2nd Reconciliation Report Field Instructions

Order By: 2nd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reconciliation Date - Search by reconciliation date.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p> <p>User ID - Search by user ID number.</p>
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Order By: 2nd Reconciliation Summary Field Instructions

Order By: 2nd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in second sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Pers. Office ID - Search by POI number.</p>
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Order By: 3rd Field Instructions

Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>
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Order By: 3rd Carrier Discrepancy Field Instructions

Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Payroll ID - Search by payroll office identification number.</p>
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Order By: 3rd Carrier Enrollees Field Instructions

Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
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Order By: 3rd Carrier Enrollment Transmission Field Instructions

Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Carrier ID - Search by carrier ID number.</p> <p>Name - Search by enrollee name.</p> <p>Year/Quarter - Search by reconciliation year and reconciliation quarter.</p> <p>Submission Date - Search by submission date.</p> <p>Status - Search by transmission status.</p>
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Order By: 3rd Carrier Validation Field Instructions

Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
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Order By: 3rd Pay Period Transmissions Payment Amounts Report Field Instructions

Order By: 3rd	<p><i>Optional, default</i></p> <p>This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Carrier - Search by carrier.</p> <p>Pay Cycle - Search by pay cycle.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>As of Date - Search by as of date.</p>
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Order By: 3rd Payroll Discrepancy Listing Field Instructions

Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>
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Order By: 3rd Reconciliation Action Field Instructions

Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Action Code - Search by reconciliation action code.</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Personnel Office ID - Search by POI number.</p>
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Order By: 3rd Reconciliation Reason Field Instructions

Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reason Code - Search by reconciliation reason code.</p>
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Order By: 3rd Reconciliation Report Field Instructions

Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reconciliation Date - Search by reconciliation date.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p> <p>User ID - Search by user ID number.</p>
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Order By: 3rd Reconciliation Summary Field Instructions

Order By: 3rd	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in third sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Pers. Office ID - Search by POI number.</p>
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Order By: 4th Field Instructions

Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>
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Order By: 4th Carrier Discrepancy Field Instructions

Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Payroll ID - Search by payroll office identification number.</p>
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Order By: 4th Carrier Enrollees Field Instructions

Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
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Order By: 4th Carrier Validation Field Instructions

Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
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Order By: 4th Pay Period Transmissssions Payment Amounts Report Field Instructions

Order By: 4th	<p><i>Optional, default</i></p> <p>This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in fourth search order:</p> <p>Carrier - Search by carrier.</p> <p>Pay Cycle - Search by pay cycle.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>As of Date - Search by as of date.</p>
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Order By: 4th Payroll Discrepancy Listing Field Instructions

Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>
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Order By: 4th Reconciliation Action Field Instructions

Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p>Action Code - Search by reconciliation action code.</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Personnel Office ID - Search by POI number.</p>
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Order By: 4th Reconciliation Reason Field Instructions

Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reason Code - Search by reconciliation reason code.</p>
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Order By: 4th Reconciliation Report Field Instructions

Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reconciliation Date - Search by reconciliation date.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p> <p>User ID - Search by user ID number.</p>
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Order By: 4th Reconciliation Summary Field Instructions

Order By: 4th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fourth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Pers. Office ID - Search by POI number.</p>
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Order By: 5th Field Instructions

Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>
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Order By: 5th Carrier Discrepancy Field Instructions

Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Payroll ID - Search by payroll office identification number.</p>
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Order By: 5th Carrier Enrollees Field Instructions

Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
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Order By: 5th Carrier Validation Field Instructions

Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
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Order By: 5th Pay Period Transmissions Payment Amounts Report Field Instructions

Order By: 5th	<p><i>Optional, default</i></p> <p>This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in fifth search order:</p> <p>Carrier - Search by carrier.</p> <p>Pay Cycle - Search by pay cycle.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>As of Date - Search by as of date.</p>
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Order By: 5th Payroll Discrepancy Listing Field Instructions

Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>
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Order By: 5th Reconciliation Action Field Instructions

Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p>Action Code - Search by reconciliation action code.</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Personnel Office ID - Search by POI number.</p>
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Order By: 5th Reconciliation Reason Field Instructions

Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reason Code - Search by reconciliation reason code.</p>
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Order By: 5th Reconciliation Report Field Instructions

Order By: 5th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in fifth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reconciliation Date - Search by reconciliation date.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p> <p>User ID - Search by user identification number.</p>
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Order By: 6th Field Instructions

Order By: 6th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>
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Order By: 6th Carrier Discrepancy Field Instructions

Order By: 6th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Payroll ID - Search by payroll office identification number.</p>
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Order By: 6th Carrier Validation Field Instructions

Order By: 6th	<p><i>Optional</i></p> <p>Defaults to the Name sort option. This field allows users to sort search results by the options listed below. To choose a sort option, select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Name - Search by enrollee name.</p> <p>SSNO - Search by enrollee SSN.</p>
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Order By: 6th Payroll Discrepancy Listing Field Instructions

Order By: 6th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p>
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Order By: 6th Reconciliation Action Field Instructions

Order By: 6th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:</p> <p>Action Code - Search by reconciliation action code.</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Payroll Office - Search by POI number.</p> <p>Personnel Office ID - Search by POI number.</p>
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Order By: 6th Reconciliation Reason Field Instructions

Order By: 6th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Payroll Office - Search by payroll office identification number.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reason Code - Search by reconciliation reason code.</p>
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Order By: 6th Reconciliation Report Field Instructions

Order By: 6th	<p><i>Optional</i></p> <p>Select one of the following options from the drop-down menu to display the selected criteria in sixth sort search order:</p> <p>Agency - Search by Agency code.</p> <p>Carrier - Search by carrier code.</p> <p>Enrollment Code - Search by enrollment code.</p> <p>Fail Count - Search by the number of times a discrepancy or warning record has failed the quarterly edit process.</p> <p>Name - Search by enrollee name.</p> <p>Pers. Office ID - Search by POI number.</p> <p>Reconciliation Date - Search by reconciliation date.</p> <p>SSNO - Search by enrollee SSN.</p> <p>Other ID - Search by the identifier used by RSP/OWCP to identify the enrollee.</p> <p>User ID - Search by user identification number.</p>
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Other Carrier ID (System Generated) Field Instructions

Other Carrier ID	<p><i>System generated</i></p> <p>Displays an identifier used by the carrier to identify the enrollee.</p>
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Other ID (System Generated) Field Instructions

Other ID	<p><i>System generated</i></p> <p>Used by the RSP and OWCP. RSP personnel use this field to reference an enrollee's civil service annuitant or civil service final identifier. OWCP personnel use this field to reference an enrollee's claim identifier.</p> <hr/> <p>Note: The Agency and POI fields are displayed in lieu of this field when a payroll office identification number other than 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.</p>
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Other ID - From Field Instructions

Other ID - From	<p><i>Optional, alphanumeric, 15 positions maximum</i></p> <p>To search for a specific enrollee record by Other ID, enter the Other ID and skip the To field.</p> <p>To search for a range of enrollee records by a range of Other IDs, type the Other ID that starts the range, then go to the To field.</p> <hr/> <p>Note for RSP: Enter the civil service annuitant (CSA) or civil service final (CSF) identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXXXX, and the CSF identifier is typed as FXXXXXXXXX.</p> <hr/> <p>These fields are used by the RSP and OWCP. RSP personnel use these fields to search for enrollee records by CSA or CSF identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.</p> <hr/> <p>Note: A search for enrollee records by complete Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p> <hr/>
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Other ID - To Field Instructions

Other ID - To	<p><i>Optional, alphanumeric, 15 positions maximum</i></p> <p>To search for a range of enrollee records by a range of Other IDs, enter the Other ID that ends the range; otherwise, leave blank.</p> <hr/> <p>Note for RSP: Enter the CSA or CSF identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXXXX, and the CSF identifier is typed as FXXXXXXXXX.</p> <hr/> <p>These fields are used by the RSP and OWCP. RSP personnel use these fields to search for enrollee records by CSA or CSF identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.</p> <hr/> <p>Note: A search for enrollee records by complete Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p> <hr/>
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Other Payroll ID (System Generated) Field Instructions

Other Payroll ID	<p><i>System generated</i></p> <p>Displays an identifier used by the Agency to identify the enrollee.</p>
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Password Field Instructions

Password	<p><i>Required</i></p> <p>Enter the password. If unsuccessful, a message will appear stating that the user ID or password entered is invalid.</p>
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Pay Cycle (Drop-Down) Field Instructions

Pay Cycle	<i>Required</i> Select the payroll office pay cycle from the drop-down menu. B - Biweekly M - Monthly O - Other
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Payroll ID (System Generated) Field Instructions

Payroll ID	<i>System generated</i> Displays the payroll office identification number.
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Payroll Office (Optional) Field Instructions

Payroll Office	<i>Optional, alphanumeric, 8 position</i> Enter the payroll office identification number.
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Payroll Office (System Generated) Field Instructions

Payroll Office	<i>System generated</i> Displays the payroll office identification number.
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Payroll Office* (Drop-Down) Field Instructions

Payroll Office*	<i>Required</i> Select the payroll office identification number from the drop-down menu.
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Payroll Office Comments (System Generated) Field Instructions

Payroll Office Comments	<i>System generated</i> Displays the payroll office's or Agency's comments.
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Payroll Office Contact Field Instructions

Payroll Office Contact	Displays the name of the payroll office contact.
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Payroll Office ID Field Instructions

Payroll Office ID	<i>Optional, alphanumeric, 8 position</i> Enter the payroll office identification number.
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Payroll Office ID (Drop-Down) Field Instructions

Payroll Office ID	<i>Required</i> Select the payroll office identification number from the drop-down menu.
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Payroll Office ID (System Generated) Field Instructions

Payroll Office ID	<i>System generated</i> Displays the payroll office identification number.
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Payroll Office ID* (Drop-Down) Field Instructions

Payroll Office ID*	<i>Required</i> Select the payroll office identification number from the drop-down menu.
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Payroll Office Number (System Generated) Field Instructions

Payroll Office Number	<i>System generated</i> Displays the payroll office number.
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Payroll Office POI Number Field Instruction

Payroll Office	<i>System generated</i> Displays the payroll office identification number.
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Percent Discrepancies Reconciled (System Generated) Field Instructions

Percent Discrepancies Reconciled	<i>System generated</i> Displays the percentage of records reconciled to total discrepancies that meet the criteria entered on the Discrepancy Summary page.
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Personnel Office ID Field Instructions

Personnel Office ID	<i>Optional, alphanumeric, 4 positions</i> Enter the personnel office identification (POI) number.
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Personnel Office ID (POI Acronym) Field Instructions

Personnel Office ID	<i>Optional, alphanumeric, 4 positions</i> Enter the POI number.
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Personnel Office ID (System Generated) Field Instructions

Personnel Office ID	<i>System generated</i> Displays the personnel office identification number.
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Phone (System Generated) Carrier Contact Field Instructions

Phone	<i>System generated</i> Displays the carrier contact's telephone number.
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Phone (System Generated) Carrier Plan Contact Field Instruction

Phone	<i>System generated</i> Displays the carrier plan contact's telephone number.
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Phone (System Generated) Payroll Office Contact Field Instructions

Phone	<i>System generated</i> Displays the payroll office contact's telephone number.
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Phone Number Carrier Contact Field Instructions

Phone Number	<i>Optional, alphanumeric, 25 positions</i> Enter the carrier contact's telephone number.
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Phone Number Carrier Plan Contact Record Field Instructions

Phone Number	<i>Optional, alphanumeric, 25 positions</i> Enter the carrier plan contact's telephone number.
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Phone Number (System Generated) Carrier Contact Field Instruction

Phone Number	<i>System generated</i> Displays the carrier contact's telephone number.
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Phone Number (System Generated) Carrier Plan Field Instructions

Phone Number	<i>System generated</i> Displays the carrier plan contact's telephone number.
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Phone Number (System Generated) Personnel Office Contact Field Instructions

Phone Number	<i>System generated</i> Displays the personnel Office contact's telephone number.
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Phone/Phone Number (System Generated) Carrier Plan Contact Field Instructions

Phone/Phone Number	<i>System generated</i> Displays the carrier plan contact's telephone number.
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Plan (Required) Field Instructions

Plan	<i>Required, alphanumeric, 2 positions</i> Enter the first two positions of the carrier enrollment code.
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Plan (System Generated) Field Instructions

Plan	<i>System generated</i> Displays the first two positions of the carrier enrollment code.
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Plan* Field Instructions

Plan*	<i>Required, alphanumeric, 2 positions</i> Enter the first two positions of the carrier enrollment code.
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POI Field Instructions

POI	<i>Optional, alphanumeric, 4 positions</i> Enter the POI of the office where the enrollee's records are maintained.
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POI (System Generated) Field Instructions

POI	<p><i>System generated</i></p> <p>Displays the POI of the office where the enrollee's records are maintained.</p> <hr/> <p>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Office Enrollees page.</p>
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POI (System Generated) Report Field Instructions

POI	<p><i>System generated</i></p> <p>Displays the POI number.</p> <hr/> <p>Note: The Other ID field is displayed in lieu of this field when 24900002, 24900003, or 160099XX is entered in the Payroll Office ID field on the Payroll Discrepancy Listing page.</p>
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Pseudo SSN (System Generated) Field Instructions

Pseudo SSN	<p><i>System generated</i></p> <p>Displays the pseudo SSN used by the Agency and carrier to identify the enrollee.</p>
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Quarter (Drop-Down) Field Instructions

Quarter*	<p><i>Optional default</i></p> <p>Select the reconciliation quarter from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.</p>
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Quarter (System Generated) Error Statistics Field Instructions

Quarter	<p><i>System generated</i></p> <p>Displays the reconciliation quarter for the requested error statistics.</p>
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Quarter (System Generated) Field Instructions

Quarter	<i>System generated</i> Displays the reconciliation quarter.
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Quarter (System Generated) Transmission Record Field Instructions

Quarter	<i>System generated</i> Displays the reconciliation quarter for the requested transmission record.
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Quarter Error Statistics Field Instructions

Quarter	<i>Optional, alphanumeric, 1 position</i> Enter the reconciliation quarter for the requested error statistics.
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Quarter Transmission Record Field Instructions

Quarter	<i>Optional, alphanumeric, 1 position</i> Enter the reconciliation quarter for the requested transmission record.
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Quarter* (Drop-Down) Field Instructions

Quarter*	<i>Required default</i> Select the reconciliation quarter from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
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Quarter* (Optional) Field Instructions

Quarter*	<i>Optional, alphanumeric, 1 position</i> Enter the reconciliation quarter for the requested error statistics.
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Quarter* (Required) Field Instructions

Quarter*	<i>Required, alphanumeric, 1 position</i> Enter the reconciliation quarter for the requested error statistics.
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Quarter* From (Optional) Field Instructions

Quarter* From	<i>Optional, default</i> Select the quarter that begins the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
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Quarter* From (Required) Field Instructions

Quarter* From	<i>Required, default</i> Select the quarter that begins the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
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Quarter* To (Optional) Field Instructions

Quarter* To	<i>Optional, default</i> Select the quarter that ends the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
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Quarter* To (Required) Field Instruction

Quarter* To	<i>Required, default</i> Select the quarter that ends the range of reconciliation quarters from the drop-down menu. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.
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Reason (System Generated) Field Instructions

Reason	<i>System generated</i> Displays the reconciliation reason code. For a list and descriptions of reconciliation reason codes, see Reconciliation Reason Codes Table (on page 255).
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Reason Code (Drop-Down) Field Instructions

Reason Code	<i>Optional</i> Select the reconciliation reason code from the drop-down menu. For a list and descriptions of these codes, see Reconciliation Reason Codes Table (on page 255).
-------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Reason/Reason Code (System Generated) Field Instructions

Reason/Reason Code	<i>System generated</i> Displays the reconciliation reason code. For a list and descriptions of reconciliation reason codes, see Reconciliation Reason Codes Table (on page 255).
--------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Reconciliation Action (System Generated) Field Instructions

Reconciliation Action	<i>System generated</i> Displays the code that identifies the action requested by the Agency to resolve a discrepancy. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Action Codes Table (on page 258).
-----------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Reconciliation Action (System Generated) Reconciliation Report Field Instructions

Reconciliation Action	<i>System generated</i> Displays the reconciliation action code. For a list and descriptions of reconciliation action codes, see Reconciliation Action Codes Table (on page 258).
-----------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------



Reconciliation Date From Field Instructions

Reconciliation Date From	<i>Optional</i> This is the date that begins the range of reconciliation dates. To select this date, select the month from the first drop-down menu, select the day from the second drop-down menu, and select the year from the third drop-down menu.
---------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Reconciliation Date (System Generated) Reconciliation Report Field Instructions

Reconciliation Date	<i>System generated</i> Displays the reconciliation date.
----------------------------	------------------------------------------------------------------

Reconciliation Date To Field Instructions

Reconciliation Date To	<i>Optional</i> This is the date that ends the range of reconciliation dates. To select this date, select the month from the first drop-down menu, select the day from the second drop-down menu; and select the year from the third drop-down menu.
-------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Reconciliation Fail Count (System Generated) Reconciliation Report Field Instructions

Reconciliation Fail Count	<i>System generated</i> Displays the number of times the initial discrepancy has been identified.
----------------------------------	----------------------------------------------------------------------------------------------------------

Reconciliation Reason (System Generated) Field Instructions

Reconciliation Reason	<i>System generated</i> Displays the code that identifies the cause of a discrepancy as reported by the Agency. A short description is displayed next to the code. Select Explain to view a detailed explanation of the reconciliation reason code or see Reconciliation Reason Codes Table (on page 255).
------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------



Reconciliation Reason (System Generated) Reconciliation Report Field Instructions

Reconciliation Reason	<i>System generated</i> Displays the reconciliation reason code. For a list and descriptions of reconciliation reason codes, see Reconciliation Reason Codes Table (on page 255).
-----------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Reconciliation User ID (System Generated) Reconciliation Report Field Instructions

Reconciliation User ID	<i>System generated</i> Displays the user identification number of the person who entered the reconciliation reason code.
------------------------	----------------------------------------------------------------------------------------------------------------------------------

Records Processed (System Generated) Field Instructions

Records Processed	<i>System generated</i> Displays the number of records accepted to store in the CLER tables.
-------------------	-----------------------------------------------------------------------------------------------------

Records Received (System Generated) Field Instructions

Records Received	<i>System generated</i> Displays the number of records found in the transmission file during processing.
------------------	-----------------------------------------------------------------------------------------------------------------

Records Reconciled (System Generated) Field Instructions

Records Reconciled	<i>System generated</i> Displays the count of records that have a reconciliation reason and action entered for every error on the record.
--------------------	--------------------------------------------------------------------------------------------------------------------------------------------------



Records Sent (System Generated) Field Instructions

Records Sent	<i>System generated</i> Displays the number of records sent in the transmission.
---------------------	-------------------------------------------------------------------------------------

Records With Errors (System Generated) Field Instructions

Records with Errors	<i>System generated</i> Displays the total number of carrier enrollee records with errors. Records with warnings are not included.
----------------------------	---------------------------------------------------------------------------------------------------------------------------------------

Records With Warnings (System Generated) Field Instructions

Records with Warnings	<i>System generated</i> Displays the total number of carrier records with warnings. Records with errors are not included.
------------------------------	------------------------------------------------------------------------------------------------------------------------------

Region (System Generated) Carrier Enrollment Field Instructions

Region	<i>System generated</i> Displays the carrier's enrollment data transmission location code assigned by NFC's CLER Operations and Reconciliation Unit.
---------------	---------------------------------------------------------------------------------------------------------------------------------------------------------

Rejected (System Generated) Field Instructions

Rejected	<i>System generated</i> Displays the number of transmissions that did not pass front-end edits and were rejected. <u>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</u>
-----------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------



Remarks (System Generated) Field Instructions

Remarks	<i>System generated</i> Displays the remarks about this record.
---------	--------------------------------------------------------------------

Remarks Field Instructions

Remarks	<i>Optional, alphanumeric, 80 positions</i> Enter remarks about this record.
---------	---------------------------------------------------------------------------------

Rencon Field Instructions

Recon	Displays the number of reconciled discrepancies.
-------	--------------------------------------------------

Report (Drop-Down) Field Instructions

Report	<i>Optional, default</i> Select the report from the drop-down menu.
--------	------------------------------------------------------------------------

Response Reminder Date (System Generated) Field Instructions

Response Reminder Date	<i>System generated</i> Displays the date a reminder regarding the lack of response to discrepancy reasons and action codes will be sent to carriers.
------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------

Role Field Instructions

Role	<i>Optional, alphanumeric, 40 positions maximum</i> Enter the title, position, etc., of the carrier contact/carrier plan contact.
------	--------------------------------------------------------------------------------------------------------------------------------------



Role (System Generated) Field Instructions

Role	<i>System generated</i> Displays the title, position, etc., of the payroll office contact/personnel office contact/carrier contact/carrier plan contact.
-------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------

Select Another Discrepancy Field Instructions

Select another discrepancy	<i>Optional</i> Select each discrepancy number to view the corresponding code and message if multiple discrepancies are shown.
-----------------------------------	-----------------------------------------------------------------------------------------------------------------------------------

Source (System Generated) Field Instructions

Source	<i>System generated</i> Displays the source of transmission data indicator. The value in the first position equals M for mainframe or S for server. The value in the second position equals T for transmission or M for manual entry.
---------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

SSN (System Generated) Field Instructions

SSN	<i>System generated</i> Displays the enrollee's SSN.
------------	---------------------------------------------------------

SSN (System Generated) Reports Field Instructions

SSN	<i>System generated</i> Displays the enrollee's SSN submitted by the payroll office.
------------	-----------------------------------------------------------------------------------------



SSN - From Field Instructions

SSN - From	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a specific enrollee record by Social Security number (SSN), enter the SSN and skip the To field.</p> <p>To search for a range of enrollee records by a range of SSNs, enter the SSN that starts the range, then proceed to the To field.</p> <hr/> <p>Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p> <hr/>
-------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

SSN - From (SSN Acronym) Field Instructions

SSN - From	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a specific enrollee record by SSN, enter the SSN and skip the To field.</p> <p>To search for a range of enrollee records by a range of SSNs, enter the SSN that starts the range, then proceed to the To field.</p> <hr/> <p>Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p> <hr/>
-------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

SSN - To Field Instructions

SSN - To	<p><i>Optional, alphanumeric, 9 positions</i></p> <p>To search for a range of enrollee records by a range of SSNs, enter the SSN that ends the range; otherwise, leave blank.</p> <hr/> <p>Note: A search for enrollee records by complete enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency or POI) on this page.</p> <hr/>
-----------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------



Start Date (System Generated) Field Instructions

Start Date	<i>System generated</i> Displays the first date the payroll office will be valid.
-------------------	--------------------------------------------------------------------------------------

Start Date (System Generated) Carrier Enrollment Code Field Instructions

Start Date	<i>System generated</i> Displays the first date the carrier enrollment code will be valid.
-------------------	-----------------------------------------------------------------------------------------------

Start Date (System Generated) Carrier Field Instructions

Start Date	<i>System generated</i> Displays the first date (MMDDYYYY) the carrier plan will be valid. If the date is not known, 01/01/2001 is displayed.
-------------------	--------------------------------------------------------------------------------------------------------------------------------------------------

Start Date (System Generated) Schedules Field Instructions

Start Date	<i>System generated</i> Displays the date the input from carriers and payroll offices is processed.
-------------------	--------------------------------------------------------------------------------------------------------

State Field Instructions

State	<i>Optional, alphanumeric, 2 positions maximum</i> Select the payroll office's, carrier's, carrier contact's, or carrier plan contact's State, U.S. territory, or overseas military abbreviation from the drop-down menu. Refer to the State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260) for a list and descriptions of State, U.S. territory, and overseas military abbreviations.
--------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------



State (System Generated) Carrier Contact Field Instructions

State	<p><i>System generated</i></p> <p>Displays the carrier contact's State, U.S. territory, or overseas military abbreviation. For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260).</p>
-------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

State (System Generated) Carrier Field Instructions

State	<p><i>System generated</i></p> <p>Displays the carrier's State, U.S. territory, or overseas military abbreviation. For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260).</p>
-------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

State (System Generated) Carrier Plan Contact Field Instructions

State	<p><i>System generated</i></p> <p>Displays the carrier plan contact's State, U.S. territory, or overseas military abbreviation. For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260).</p>
-------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

State (System Generated) Payroll Office Contact Field Instructions

State	<p><i>System generated</i></p> <p>Displays the payroll office contact's State, U.S. territory, or overseas military abbreviation. For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260).</p>
-------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------



State (System Generated) Payroll Office Field Instructions

State	<i>System generated</i> Displays the payroll office's State, U.S. territory, or overseas military abbreviation. For a list and descriptions of State, U.S. territory, and overseas military abbreviations, see State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260).
--------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

State (System Generated) Personnel Office Contact Field Instructions

State	<i>System generated</i> Displays the personnel office contact's State, U.S. territory, or overseas military abbreviation. For a list and descriptions of State, U.S. territory, and overseas military abbreviations, State, U.S. Territory, and Overseas Military Abbreviations Table (on page 260).
--------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Status (System Generated) Carrier Enrollment Transmission Field Instructions

Status	<i>System generated</i> Displays 000 for an accepted transmission; otherwise, a carrier system code is displayed. It indicates the status of a carrier enrollment data transmission. For a list and descriptions of carrier system codes, see Carrier System Codes Table (on page 253).
---------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Status (System Generated) Field Instructions

Status	<i>System generated</i> Displays active to indicate that the record has been activated in CLER. Displays inactive to indicate that the record has been inactivated in CLER.
---------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------



Status (System Generated) Transmissions Field Instructions

Status	<i>System generated</i> Displays 000 for an accepted transmission; otherwise, a carrier system code is displayed. It indicates the status of a carrier enrollment data transmission. For a list and descriptions of carrier system codes, see Carrier System Codes Table (on page 253).
---------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Submission (System Generated) Field Instructions

Submission	<i>System generated</i> Displays the transmission submission for this enrollee record.
-------------------	-----------------------------------------------------------------------------------------------

Submission (System Generated) Transmission Date Field Instructions

Submission	<i>System generated</i> Displays the number of transmissions submitted for the reconciliation quarter selected.
-------------------	------------------------------------------------------------------------------------------------------------------------

Submission Date (System Generated) Carrier Enrollment Transmission Field Instructions

Submission Date	<i>System generated</i> Displays the date (MMDDYYYY) the carrier enrollment data file was submitted for processing.
------------------------	----------------------------------------------------------------------------------------------------------------------------

Submission Date (System Generated) Field Instructions

Submission Date	<i>System generated</i> Displays the date the transmission was submitted.
------------------------	----------------------------------------------------------------------------------

Submission Reminder Date (System Generated) Field Instructions

Submission Reminder Date	<i>System generated</i> Displays the date the submission reminder is sent.
---------------------------------	-----------------------------------------------------------------------------------



Submitter Use #1 (System Generated) Field Instructions

Submitter Use #1	<i>System generated</i> Displays remarks that were entered by the organization that created the record/enrollment record.
------------------	------------------------------------------------------------------------------------------------------------------------------

Submitter Use #2 (System Generated) Field Instructions

Submitter Use #2	<i>System generated</i> Displays remarks that were entered by the organization that created the record/enrollment record.
------------------	------------------------------------------------------------------------------------------------------------------------------

Submitter Use #3 (System Generated) Field Instructions

Submitter Use #3	<i>System generated</i> Displays remarks that were entered by the organization that created the record/enrollment record.
------------------	------------------------------------------------------------------------------------------------------------------------------

Threshold Type (System Generated) Field Instructions

Threshold Type	<i>System generated</i> Displays the number measure of the error threshold. P represents percent and N represents number.
----------------	--------------------------------------------------------------------------------------------------------------------------------------------

Time Processed (System Generated) Field Instructions

Time Processed	<i>System generated</i> Displays the time the record was processed (using military time).
----------------	----------------------------------------------------------------------------------------------

Time Processed (System Generated) Transmissions Field Instructions

Time Processed	<i>System generated</i> Displays the current application time when the process was run.
----------------	--------------------------------------------------------------------------------------------



To (Quarter/Year) (System Generated) Field Instructions

To (Quarter/Year)	<i>System generated</i> Displays the number of enrollees covered by the enrollment code displayed in the Code field during the selected quarter and year.
--------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------

Total (System Generated) Field Instructions

Total	<i>System generated</i> Displays the sum of transmission records displayed on the report. <u>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</u>
--------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Total (System Generated) Reconciliation Action Field Instructions

Total	<i>System generated</i> Displays the number of specified reconciliation action codes that meet the criteria entered on the Reconciliation Action Summary page.
--------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------

Total (System Generated) Reconciliation Reason Field Instructions

Total	<i>System generated</i> Displays the number of specified reconciliation reason codes that meet the criteria entered on the Reconciliation Reason Summary page.
--------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------

Total Discrepancies Found (System Generated) Field Instructions

Total Discrepancies Found	<i>System generated</i> Displays the total number of records with discrepancies that meet the criteria entered on the Discrepancy Summary page.
----------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------



Total Discrepancies Reconciled (System Generated) Field Instructions

Total Discrepancies Reconciled	<i>System generated</i> Displays the total number of reconciled records that meet the criteria entered on the Discrepancy Summary page.
---------------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------

Total Enrollee Records (System Generated) Field Instructions

Total Enrollee Records	<i>System generated</i> Displays the total number of enrollees that meet the criteria entered on the Discrepancy Summary page.
-------------------------------	-----------------------------------------------------------------------------------------------------------------------------------

Total Errors (System Generated) Field Instructions

Total Errors	<i>System generated</i> Displays the total number of errors identified.
---------------------	----------------------------------------------------------------------------

Total Errors (System Generated) Reconciliation Field Instructions

Total Errors	<i>System generated</i> Displays the sum of the numbers displayed in the Total field. <hr/> <u>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</u>
---------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Total Matches Found (System Generated) Field Instructions

Total Matches Found	<i>System generated</i> Displays the total number of matched records that meet the criteria entered on the Discrepancy Summary page.
----------------------------	-----------------------------------------------------------------------------------------------------------------------------------------



Total Records (System Generated) Field Instructions

Total Records	<i>System generated</i> Displays the total number of enrollee records displayed on the report. <hr/> Note: If the check box used to omit totals from a report is selected, this field is not displayed. <hr/>
----------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Total Records (System Generated) Reconciliation Field Instructions

Total Records	<i>System generated</i> Displays the total number of records displayed on the report. <hr/> Note: If the check box used to omit totals from a report is selected, this field is not displayed. <hr/>
----------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Total Records (System Generated) Reconciliation Report Field Instructions

Total Records	<i>System generated</i> Displays the the sum of enrollee records on the report. <hr/> Note: If the check box used to omit totals from a report is selected, this field is not displayed. <hr/>
----------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Total Warnings (System Generated) Field Instructions

Total Warnings	<i>System generated</i> Displays the total number of warnings identified.
-----------------------	------------------------------------------------------------------------------



Transmission File Name (System Generated) Field Instructions

Transmission File Name	<i>System generated</i> Displays the name of the quarterly transmission file sent by the payroll office.
-------------------------------	-------------------------------------------------------------------------------------------------------------

Transmissions Field Instructions

Transmissions	<i>Optional, default</i> Displays search results by the options listed below. If no display option is selected, this field automatically defaults to the All display option. To choose a display option, select the radio button next to one of the following values: All - Search by all transmissions. Accepted - Search by accepted transmissions. Rejected - Search by rejected transmissions. Not Received - Search by not received transmissions.
----------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Type Field Instructions

Type	<i>Optional</i> Select either General for an administrative contact or Technical for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
-------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Type (System Generated) Field Instructions

Type	<i>System generated</i> Displays General type code to indicate that the payroll office contact holds an administrative position. Displays Technical type code to indicate that the payroll office contact holds a technical position.
-------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------



Type* Field Instructions

Type*	<i>Required</i> Select either General for an administrative contact or Technical for a technical contact from the drop-down menu. The Type code indicates whether the payroll office contact is an administrative contact or a technical contact.
-------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Unrecon (System Generated) Field Instructions

Unrecon	<i>System generated</i> Displays the number of unreconciled discrepancies.
---------	-----------------------------------------------------------------------------------

Unvalidated (System Generated) Field Instructions

Unvalidated	<i>System generated</i> Displays the number of discrepancies/reconciliation actions that were not validated by the carrier.
-------------	------------------------------------------------------------------------------------------------------------------------------------

User ID (Optional) Field Instructions

User ID	<i>Optional, alphanumeric, 8 positions maximum</i> Enter the user identification number of the person creating the report.
---------	-----------------------------------------------------------------------------------------------------------------------------------

User ID (Required) Field Instructions

User ID	<i>Required, alphanumeric, 8 positions maximum</i> Enter the assigned National Finance Center user ID.
---------	---------------------------------------------------------------------------------------------------------------

User ID (System Generated) Field Instructions

User ID	<i>System generated</i> Displays the user identification number of the person who entered the validation reason code.
---------	------------------------------------------------------------------------------------------------------------------------------



Validated (System Generated) Field Instructions

Validated	<i>System generated</i> Displays the number of discrepancies/reconciliation actions that were validated by the carrier.
------------------	----------------------------------------------------------------------------------------------------------------------------

Validation (System Generated) Field Instruction

Validation	<i>System generated</i> Displays the status of the validation.
-------------------	-------------------------------------------------------------------

Validation (System Generated) Transmission Field Instructions

Validation	<i>System generated</i> Displays the status of the validation. The Validated code is displayed when the transmission is validated. The Cleared code is displayed when the transmission validation is cleared.
-------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Validation Date (System Generated) Field Instructions

Validation Date	<i>System generated</i> Displays the validation date.
------------------------	----------------------------------------------------------

Validation Date From Field Instructions

Validation Date From	<i>Optional</i> Select the month from the first drop-down menu, select the day from the second drop-down menu; and select the year from the third drop-down menu. This is the date that begins the range of reconciliation dates.
-----------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------



Validation Date To Field Instructions

Validation Date To	<p><i>Optional</i></p> <p>Select the month from the first drop-down menu, select the day from the second drop-down menu; and select the year from the third drop-down menu. This is the date that ends the range of reconciliation dates.</p>
--------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Warning Code (Drop-Down) Field Instructions

Warning Code	<p><i>Optional</i></p> <p>Select the warning code from the drop-down menu. Refer to the Warning Codes Table (on page 252) for a list and descriptions of these codes.</p>
--------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Warning Code (Optional) Field Instructions

Warning Code	<p><i>Optional</i></p> <p>Select the applicable warning code from the list of warning codes. Refer to the Warning Codes Table (on page 252) for a list and descriptions of warning codes.</p>
--------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Warnings (System Generated) Field Instructions

Warnings	<p><i>System generated</i></p> <p>Displays the sum of warning codes displayed in the Discrepancy field.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p> <hr/>
----------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Whld Amt (System Generated) Report Field Instructions

Whld Amt	<p><i>System generated</i></p> <p>Displays the enrollee's withholding amount submitted by the payroll office.</p>
----------	-------------------------------------------------------------------------------------------------------------------



With Errors (System Generated) Reconciliation Report Field Instructions

With Errors	<p><i>System generated</i></p> <p>Displays the sum of enrollee records with codes in the Reason and Action fields.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p> <hr/>
--------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Without Errors (System Generated) Reconciliation Report Field Instructions

Without Errors	<p><i>System generated</i></p> <p>Displays the sum of enrollee records with no codes in the Reason and Action fields.</p> <hr/> <p>Note: If the check box used to omit totals from a report is selected, this field is not displayed.</p> <hr/>
-----------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Year (Drop-Down) Field Instructions

Year*	<p><i>Required, default</i></p> <p>Select the reconciliation year from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.</p>
--------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Year (Error Statistics) Field Instructions

Year	<p><i>Optional, alphanumeric, 4 positions</i></p> <p>Enter the reconciliation year for the requested error statistics.</p>
-------------	----------------------------------------------------------------------------------------------------------------------------

Year (Optional) Transmission Record Field Instructions

Year	<p><i>Optional, alphanumeric, 4 positions</i></p> <p>Enter the reconciliation year for the requested transmission record.</p>
-------------	-------------------------------------------------------------------------------------------------------------------------------



Year (Required) Schedules Field Instructions

Year	<i>Required, alphanumeric, 4 positions</i> Enter the reconciliation year.
------	------------------------------------------------------------------------------

Year (System Generated) Carrier Errors Field Instructions

Year	<i>System generated</i> Displays the reconciliation year for the requested error statistics.
------	-------------------------------------------------------------------------------------------------

Year (System Generated) Field Instructions

Year	<i>System generated</i> Displays the reconciliation year.
------	--------------------------------------------------------------

Year (System Generated) Transmission Record Field Instructions

Year	<i>System generated</i> Displays the reconciliation year for the requested transmission record.
------	----------------------------------------------------------------------------------------------------

Year* From (Optional) Field Instructions

Year* From	<i>Optional, default</i> Select the year that begins the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Year* From (Required) Field Instructions

Year* From	<i>Required, default</i> Select the year that begins the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------



Year* To (Optional) Field Instructions

Year* To	<i>Optional, default</i> Select the year that ends the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
----------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Year* To (Required) Field Instructions

Year* To	<i>Required, default</i> Select the year that ends the range of reconciliation years from the drop-down menu. If no year is selected, this field automatically defaults to the current reconciliation year.
----------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Year/Quarter From (System Generated) Field Instructions

Year/Quarter From	<i>System generated</i> Displays the reconciliation year/quarter that begins the range of reconciliation years/quarters.
-------------------	-----------------------------------------------------------------------------------------------------------------------------

Year/Quarter To (System Generated) Field Instructions

Year/Quarter To	<i>System generated</i> Displays the reconciliation year/quarter that ends the range of reconciliation years/quarters.
-----------------	---------------------------------------------------------------------------------------------------------------------------

Zip (Optional) Carrier Contact Field Instructions

Zip	<i>Optional, alphanumeric, 11 positions maximum</i> Enter the carrier contact's ZIP Code.
-----	----------------------------------------------------------------------------------------------

Zip (System Generated) Carrier Contact Field Instructions

Zip	<i>System generated</i> Displays the carrier contact's ZIP Code.
-----	---------------------------------------------------------------------



Zip (System Generated) Carrier Field Instructions

Zip	<i>System generated</i> Displays the carrier's ZIP Code.
-----	-------------------------------------------------------------

Zip (System Generated) Carrier Plan Contact Field Instructions

Zip	<i>System generated</i> Displays the carrier plan contact's ZIP Code.
-----	--------------------------------------------------------------------------

ZIP (System Generated) Payroll Office Contact Field Instructions

Zip	<i>System generated</i> Displays the payroll office contact's ZIP Code.
-----	----------------------------------------------------------------------------

ZIP (System Generated) Payroll Office Field Instructions

Zip	<i>System generated</i> Displays the payroll office's ZIP Code.
-----	--------------------------------------------------------------------

ZIP (System Generated) Personnel Office Contact Field Instructions

Zip	<i>System generated</i> Displays the personnel office contact's ZIP Code.
-----	------------------------------------------------------------------------------



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